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Innovative Housing Grants Program

REVIEW OF OWNERSHIP RETIREMENT HOUSING PROJECTS IN RED DEER, ALBERTA

April, 1988

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The views and conclusions expressed and the recommendations made in this report are entirely those of the authors and should not be construed as expressing the opinions of Alberta Municipal Affairs.

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FOREWORD

The project documented in this report received funding under the Innovative Housing Grants Program of Alberta Municipal Affairs. The Innovative Housing Grants Program is intended to encourage and assist housing research and development which will reduce housing costs, improve the quality and performance of dwelling units and subdivisions, or increase the long term viability and competitiveness of Alberta's housing industry.

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EXECUTIVE SUMMARY

This study evaluated two retirement projects in Red Deer—Parkvale Estates, a seniors' project developed through self-help efforts of a group of seniors, and Parkvale Downs, a project developed by private industry.

The purpose of this study was to prepare a report which designers, developers, and prospective owners might utilize to assist in their decisions regarding the design, building, purchase, or operation of owner-occupied retirement housing. The detailed objectives were to:

1) identify the needs, expectations, and preferences of the mature market in Red Deer;

2) determine the degree to which Parkvale Estates and Parkvale Downs developments satisfy the owners' requirements;

3) evaluate the degree to which any design and development differences between the projects have affected resident satisfaction and indicate how the designs might be improved;

4) compare these findings to comparable findings from a previous study of Horizon Village retirement housing projects in Edmonton; and

5) estimate the impact of this form of housing on seniors in terms of improvements to their self-sufficiency and independence.

Two research methods—mail questionnaires and interviews—were used to collect data from individuals from four groups: project developers, project management associations, unit buyers, and individuals who considered buying but decided against the purchase of a Parkvale Downs unit.

The major findings of this study include:

- the ownership retirement village is a well-received concept in Red Deer;
- buyers and non-buyers of Parkvale units were similar in demographic, socioeconomic, and housing characteristics;
- buyers purchased Parkvale units seeking low outdoor maintenance, a mature adult community, to please family, and to meet changing housing needs;
- non-buyers liked the concept but were not yet ready to move;
- housing expectations were generally met by Parkvale Estates or Parkvale Downs ownership;
- owner satisfaction was high;
- Parkvale Estate owners were more satisfied than Parkvale Downs and Horizon Village owners in part because of the self-help approach to development which resulted in substantial savings in unit cost;
- several suggestions for project improvements were expressed; and
- most residents expect this to be their final move but wish to arrange support services on their own as required.

The key differences between Parkvale in Red Deer and Horizon Village in Edmonton are: 1) there are no recreation centers in the Parkvale projects, 2) Parkvale Downs has both bungalow and two-story units, 3) Parkvale Estates and Parkvale Downs are fee simple ownership; Horizon Village is a condominium, and 4) Parkvale Estates was a non-profit approach.

Opportunity and competition within the rapidly growing mature market segment is increasing. As witnessed in Parkvale Estates, seniors who had the opportunity to voice their opinions and wishes were significantly more satisfied with the final housing product. It should be noted, however, that price also played a major role—75% of Parkvale Estates buyers bought units because they were very affordably priced at about $20,000 lower than market value (because of the self-help approach and Mr. Mittelmeyer's efforts). Private industry can benefit from this approach as well by allowing seniors the opportunity to participate in the decisions regarding the design and development of housing for this market. Seniors want to play a role in the development of housing alternatives which accurately meet their needs, lifestyles, and preferences.

In conclusion, because the mature market will represent a stable and significant market in the near future, the challenge for private industry lies in providing suitable and desirable options for seniors. If buyers have a voice in design, they tend to be more satisfied. In turn, this may lead to longer tenancy and aging-in-place.

SECTION 1

INTRODUCTION

1.1 Purpose of the Study

1.2 Scope and Focus of the Study

1.3 Statement of the Problem

1.4 Terminology and Definitions

1.5 Study Approach

1.6 Report Structure

1.0 INTRODUCTION

This section summarizes the study background, purpose, scope and focus, the problems to be addressed, and the report structure.

1.1 Background

There is increasing interest in the design and development of lifestyle-specific, ownership, retirement housing in Alberta. One innovative approach to such housing has been the seniors' retirement housing projects developed in Red Deer. Parkvale Estates—a self-help project by seniors—and Parkvale Downs—developed by Avalon Homes in Red Deer—appear to be meeting seniors' demand for alternative housing types to accommodate changing needs in retirement. Further, information on this form of housing is required by those members of the housing industry involved in the design, development, or ownership of such housing. This study responds to that need.

1.2 Purpose of the Study

This study evaluated two retirement housing projects in Red Deer: Parkvale Estates, a project developed through the self-help efforts of a group of seniors; and Parkvale Downs, a project developed by a local builder.

The purpose of this project was to prepare a report which designers, developers, and prospective owners may utilize to assist in their decisions regarding the design, building, purchase, or operation of owner-occupied retirement housing. The detailed objectives were to:

1) identify the needs, expectations, and preferences of the owner occupants of the Parkvale Estates and Parkvale Downs projects in Red Deer with respect to the cost, design, and operating aspects of their retirement housing choices;
2) ascertain the degree to which Parkvale Estates and Parkvale Downs developments satisfy the owners' requirements;

3) evaluate the degree to which any design and development differences between the projects have affected resident satisfaction and indicate how the designs might be improved;

4) compare these findings to comparable findings from a previous study of Horizon Village retirement housing projects in Edmonton entitled Ownership Retirement Housing Projects in Alberta; and

5) estimate the impact of this form of housing on seniors in terms of improvements to their self-sufficiency and independence.

1.3 Scope and Focus of the Study

The scope and focus of the study included:

- those seniors and mature buyers who were healthy and financially independent who have purchased housing in Parkvale Estates or Parkvale Downs projects in Red Deer;
- project and unit designs;
- restrictions on occupancy and use;
- management and operating issues including services provided to support the residents' retirement lifestyle;
- the pricing and marketing strategy employed by the respective developers; and
- individuals who elected not to purchase these units to ascertain the basis for their decisions.

The study focuses on user satisfaction with the Parkvale Estates and Parkvale Downs projects with a view to improving the satisfaction potential and marketability of this type of retirement village project.

1.4 Study Approach

Two research methods—mail questionnaires and interviews—were used to collect data from individuals from four groups: project developers, project management associations, unit buyers, and individuals who considered buying but decided against

the purchase of a Parkvale Downs unit. The study methodology is discussed further in Section 3.

1.5 Report Structure

The report is organized such that each major section begins with a brief introduction and explanation of the contents and concludes with a general summary of the information covered in that section.

The sections of the report include:

- Section 2: a description of Parkvale Estates and Parkvale Downs;
- Section 3: stages of research, sample, and data analysis;
- Sections 4 through 8: questionnaire findings;
- Section 9: interview summaries; and
- Section 10: conclusions and recommendations.

Information on questionnaires, questionnaire results, tables, and glossary are included in the appendices.

SECTION 2

PARKVALE ESTATES AND PARKVALE DOWNS

2.1 Parkvale Estates

2.2 Parkvale Downs

2.0 PARKVALE ESTATES AND PARKVALE DOWNS

Two innovative retirement housing projects were developed in Red Deer in 1985-86. Parkvale Estates is the product of a seniors' self-help, non-profit approach; Parkvale Downs is a project built by the private sector.

This section summarizes each project developer, location, site, amenities, design, marketing, management, and pricing.

2.1 Parkvale Estates

In 1979, some members of a seniors' self-help action group called "Pensioners Concerned" in Red Deer began to identify retired persons living in their own homes and their concerns about what they would do at the point in their lives when their homes were too large to manage and maintain. A study by Pensioners Concerned determined that a seniors-only project was the solution.

In 1983 the members of Pensioners Concerned decided to develop a low-cost retirement housing project in Red Deer. They established a non-profit society—Parkvale Estates Society—and began negotiations for rezoning and purchase of a parcel of city-owned land for the project. In June, 1984, this land (3.84 acres) in Parkvale was purchased from the City of Red Deer for $652,800. At this time, membership in the Parkvale Estates Society was well beyond the number of seniors required to develop the project.

In 1985, Bill Mittelmeyer, the Society's president and project supervisor, who was experienced in the construction industry, oversaw the project including surveying, engineering, design, and construction trades. Committees were also formed to deal with various housing aspects such as owner input organization and subsequent project management. By September, 1986, the group had a $3 million, 47-unit retirement project.

The project was designed to give seniors the opportunity to remain independent by owning their own homes with provision for maintenance and upkeep. Ownership

and residence was restricted to those seniors 55 years of age and older through a restricted covenant attached to each title.

2.1.1 Location/Site/Amenities

Parkvale Estates is ideally located in central Red Deer with close proximity to hospitals, nursing homes, lodges, seniors' recreation, and shopping. The site is adjacent to Bower Park, with approximately half the units backing onto it (see Figures 2.1, page 8 and 2.2, page 9).

Although no recreation center is located on-site, there are numerous facilities within two or three blocks (see Figures 2.3, page 10 and 2.4, page 11). Their proximities are discussed in greater detail in Section 8.

2.1.2 Design

Forty-seven bungalow-style units were designed in a modified U-shape layout (see Figure 2.5, page 12). The units are arranged in clusters and vary from two-plex to eight-plex units, with the inner units facing a courtyard and most outer units backing onto the park. Units were built with on-grade, heated concrete slabs (no basements) and have single, attached garages. The units are heated by a hot water system.

The units were originally designed as 86.5 square meter (930 square foot), two-bedroom homes (see Figure 2.6, page 13). However, the option to enlarge the living room length by four feet was exercised by 26 of the 47 owners. As well, each owner was allowed extensive design changes which essentially resulted in 47 individually designed units.

2.1.3 Marketing

Word-of-mouth, through Pensioners Concerned and Parkvale Estates Society, was the major source of information about the proposed project. In addition, one advertisement about the Society was placed in the Advocate newspaper.

FIGURE 2.1 PARKVALE ESTATES

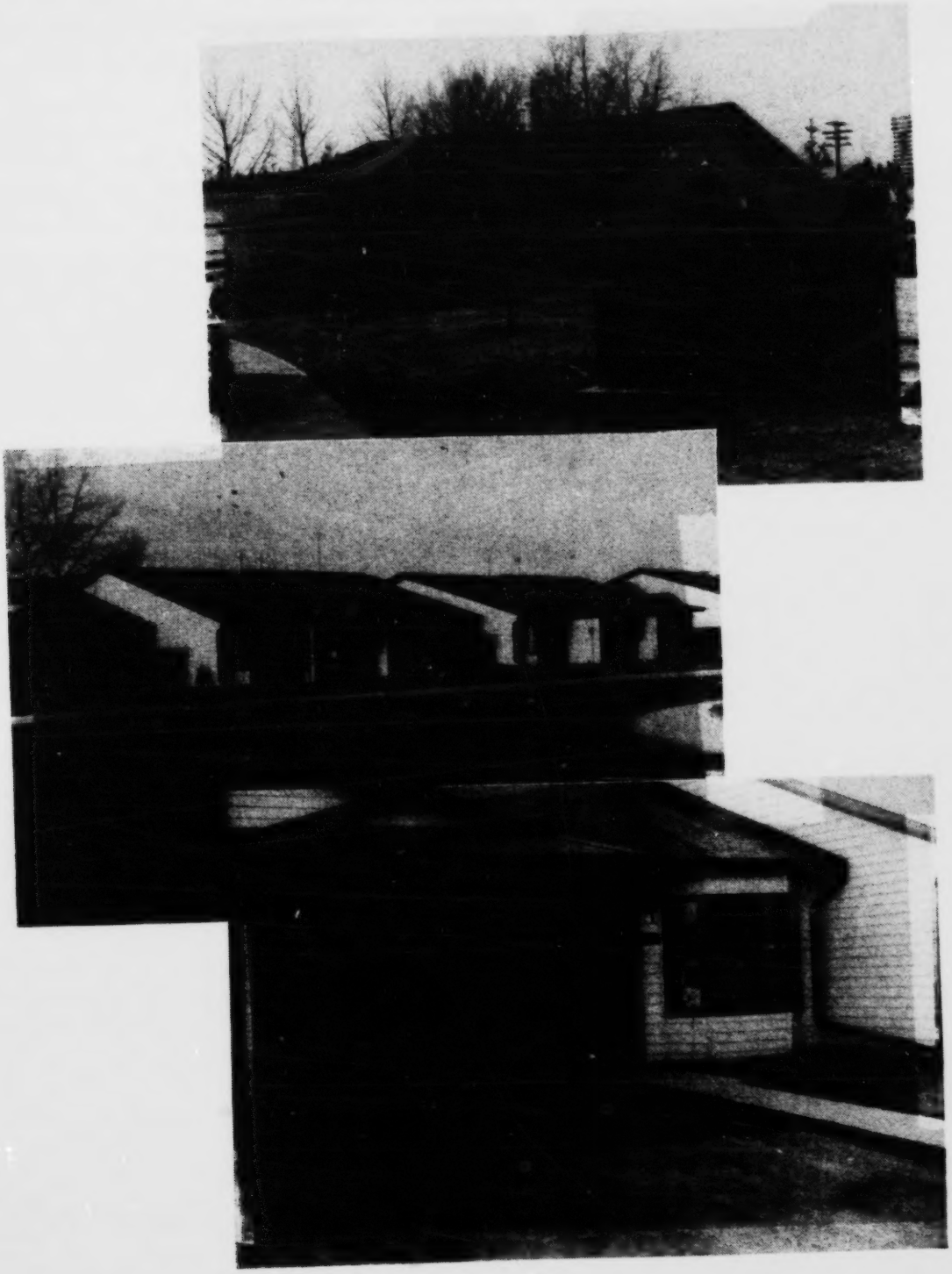
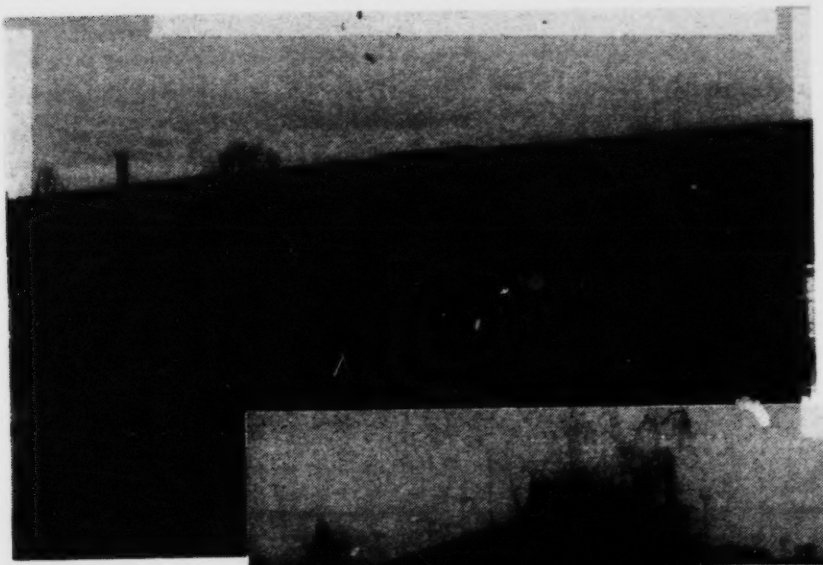


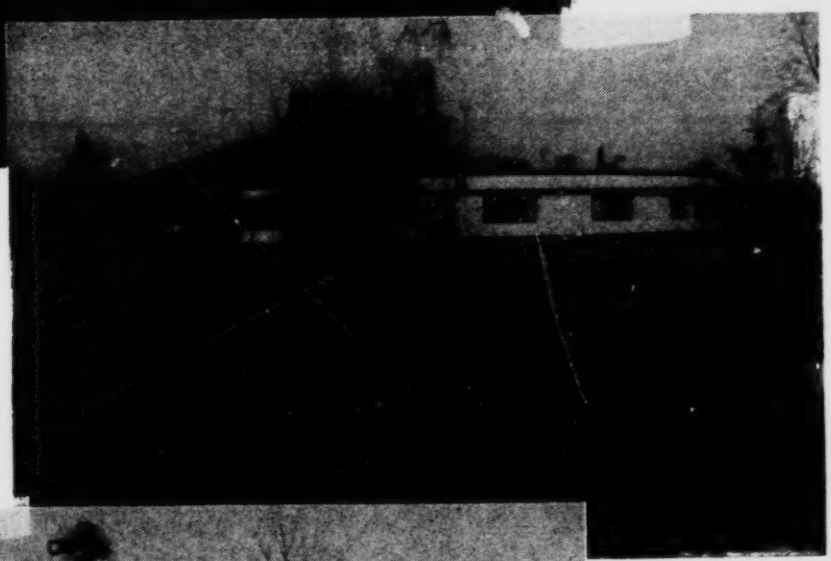
FIGURE 2.2 PARKVALE ESTATES

FIGURE 2.3 SURROUNDING SOCIAL/RECREATIONAL AMENITIES



2 - 3 blocks away

Museum



2 - 3 blocks away

Golden Circle

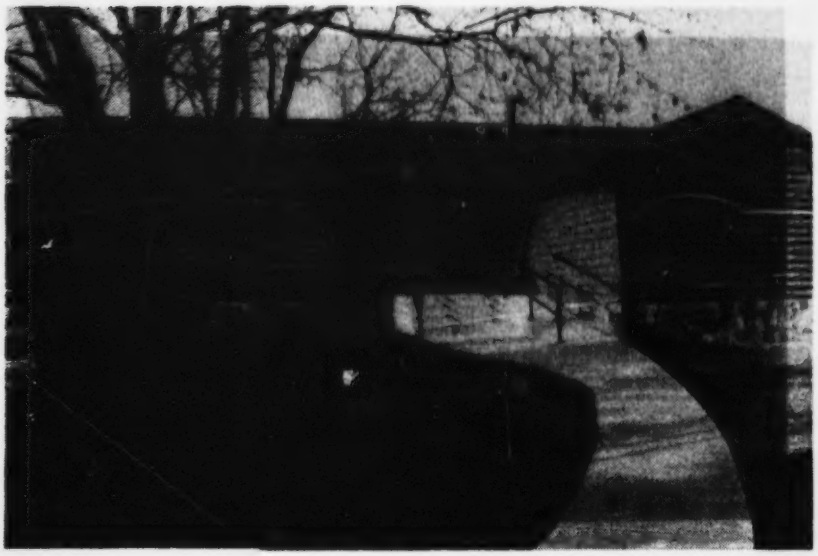
Seniors Centre

1 - 2 blocks away

Arena and

Curling Rink

FIGURE 2.4 SURROUNDING SOCIAL/RECREATIONAL AMENITIES



1 - 2 blocks away Pioneer Lodge

1 - 2 blocks away Recreation Park

FIGURE 2.5 PARKVALE ESTATES SITE PLAN

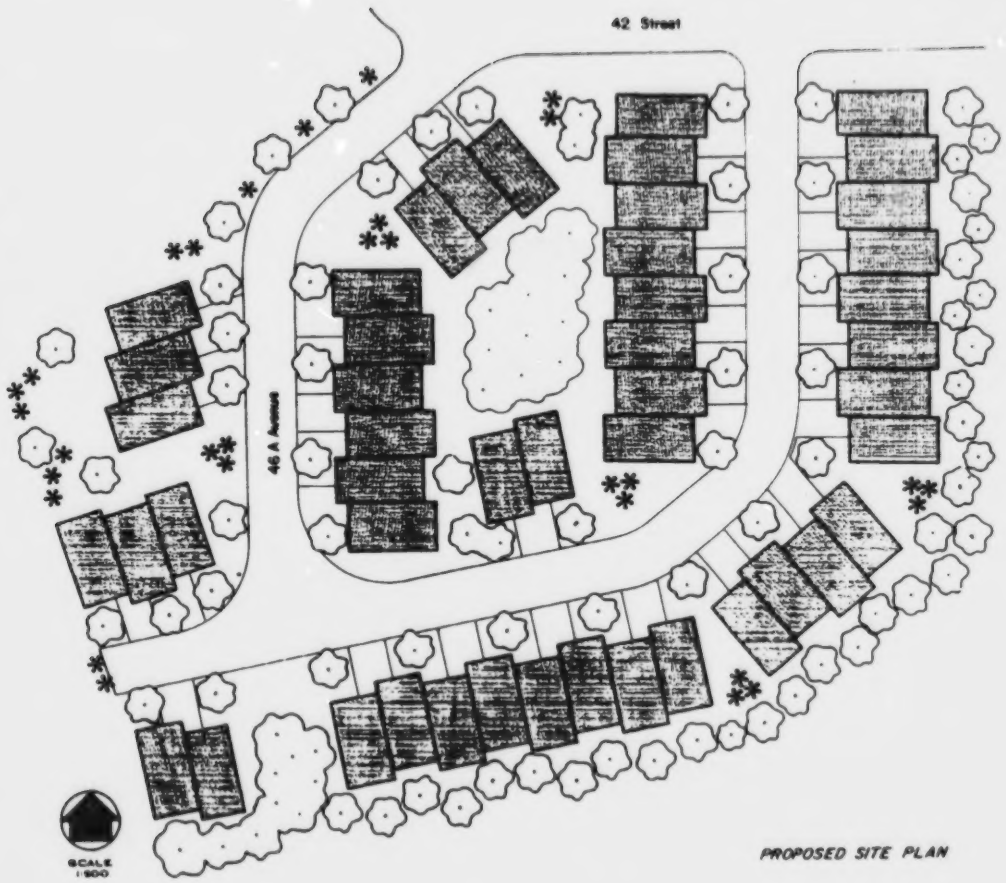
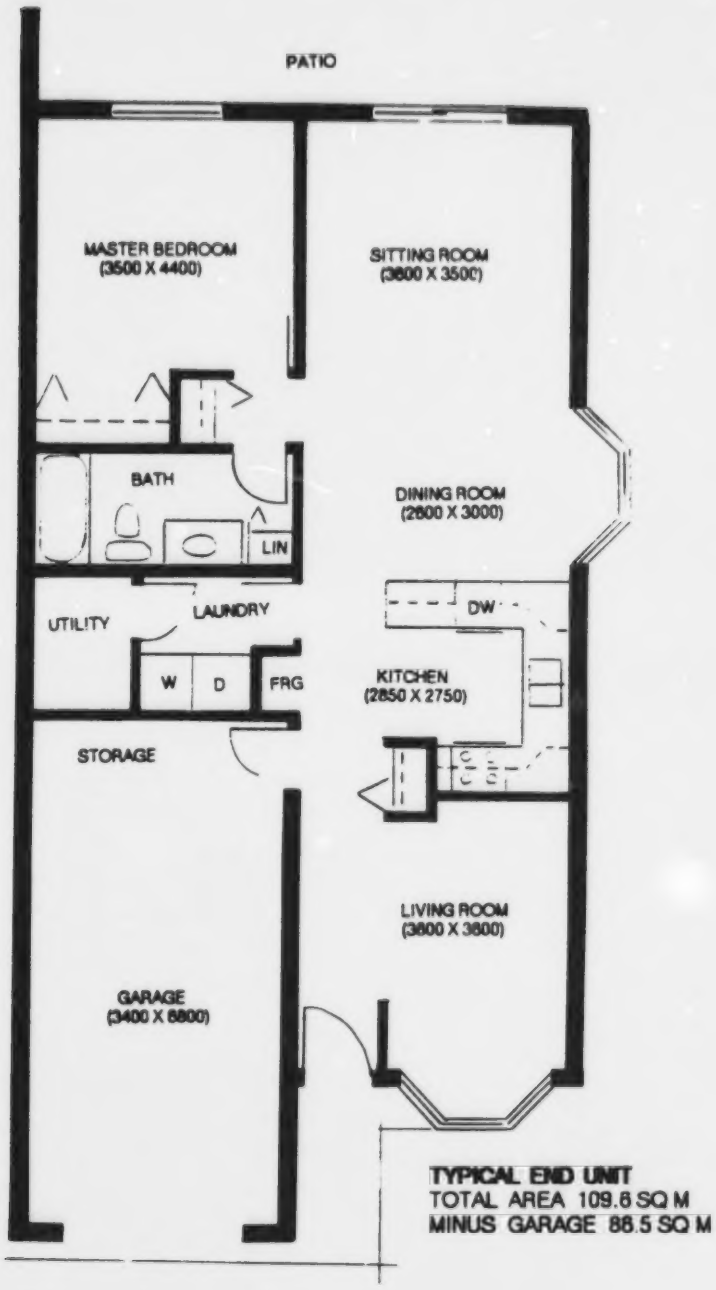


FIGURE 2.6 PARKVALE ESTATES FLOOR PLAN



2.1.4 Management

Although Parkvale Estates is fee simple, it is managed by a board consisting of a president, vice-president, secretary, treasurer, and three general board members. Sub-committees look after project issues and duties such as outdoor maintenance.

2.1.5 Pricing

The base price of the standard unit was $55,000. Many buyers took the opportunity to upgrade their units and to extend the living room width. As a result, the majority of buyers paid between $57,000 and $60,000. Nearly all, however, paid under $70,000. Because of the affordability and involvement opportunities, Parkvale Estates had an extensive wait-list of interested seniors prior to construction.

2.2 Parkvale Downs

Avalon Homes, a local builder in Red Deer, began development of Parkvale Downs in August, 1984, after contact with Pensioners Concerned. Land in Parkvale was available for multi-family development near Parkvale Estates. Avalon planned a two-phased townhouse project consisting of 41 units—approximately half of two-story and half of bungalow design (see Figures 2.7, page 15 and 2.8, page 16). It should be noted that Parkvale Downs was 75% sold at the time Parkvale Estates began construction.

The project was targeted to those people 50 years and over. In reality, the project was sold as a "45-plus" community.

2.2.1 Location/Site/Amenities

Parkvale Downs, only one block from Parkvale Estates, is also ideally located with close proximity to services. It is not situated adjacent to Bower Park but rather nestled within a residential neighborhood and adjacent to a new provincial lodge (the lodge is located between Parkvale Estates and Parkvale Downs).

As with Parkvale Estates, there is no recreation center on-site.

FIGURE 2.7 PARKVALE DOWNS

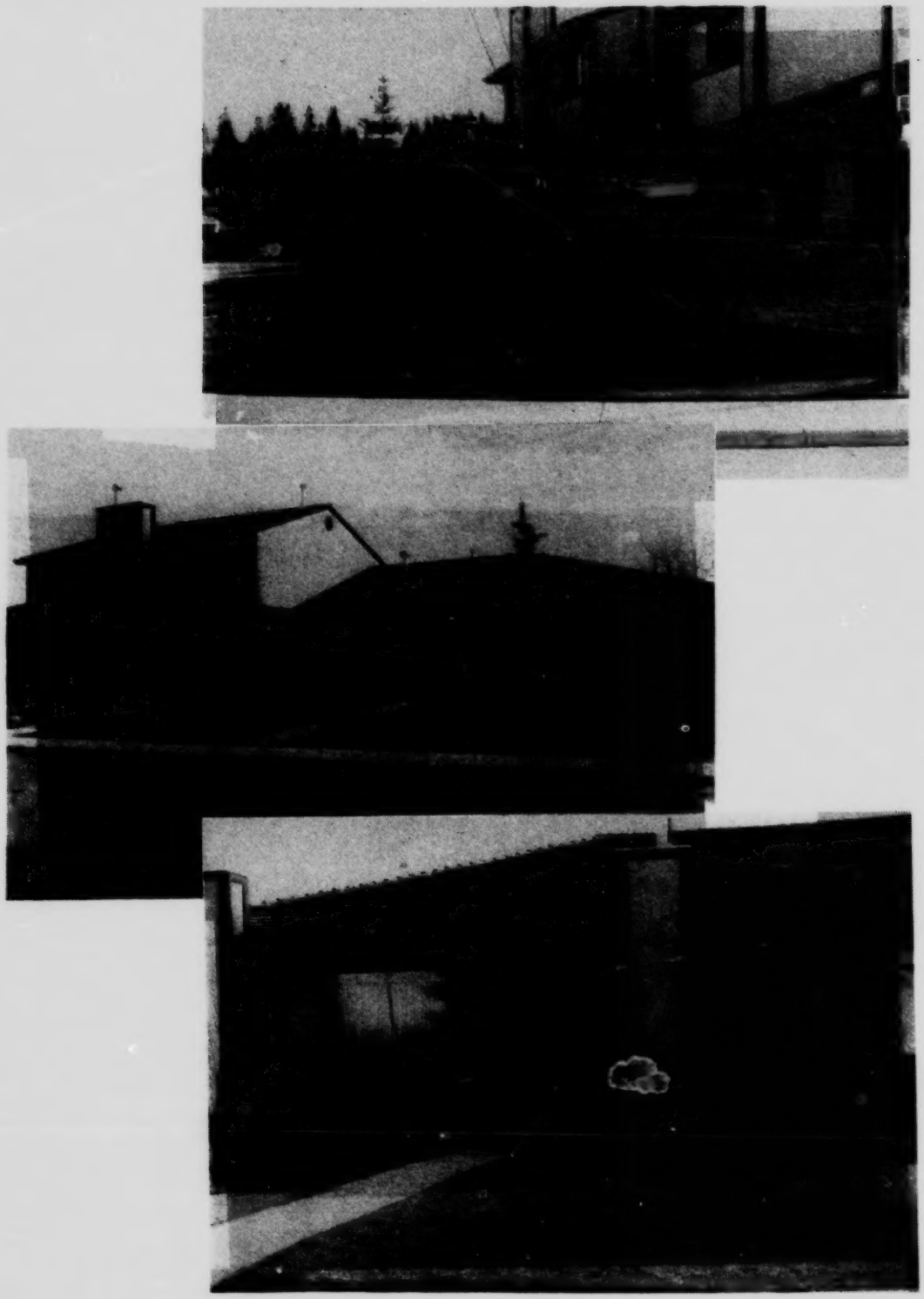
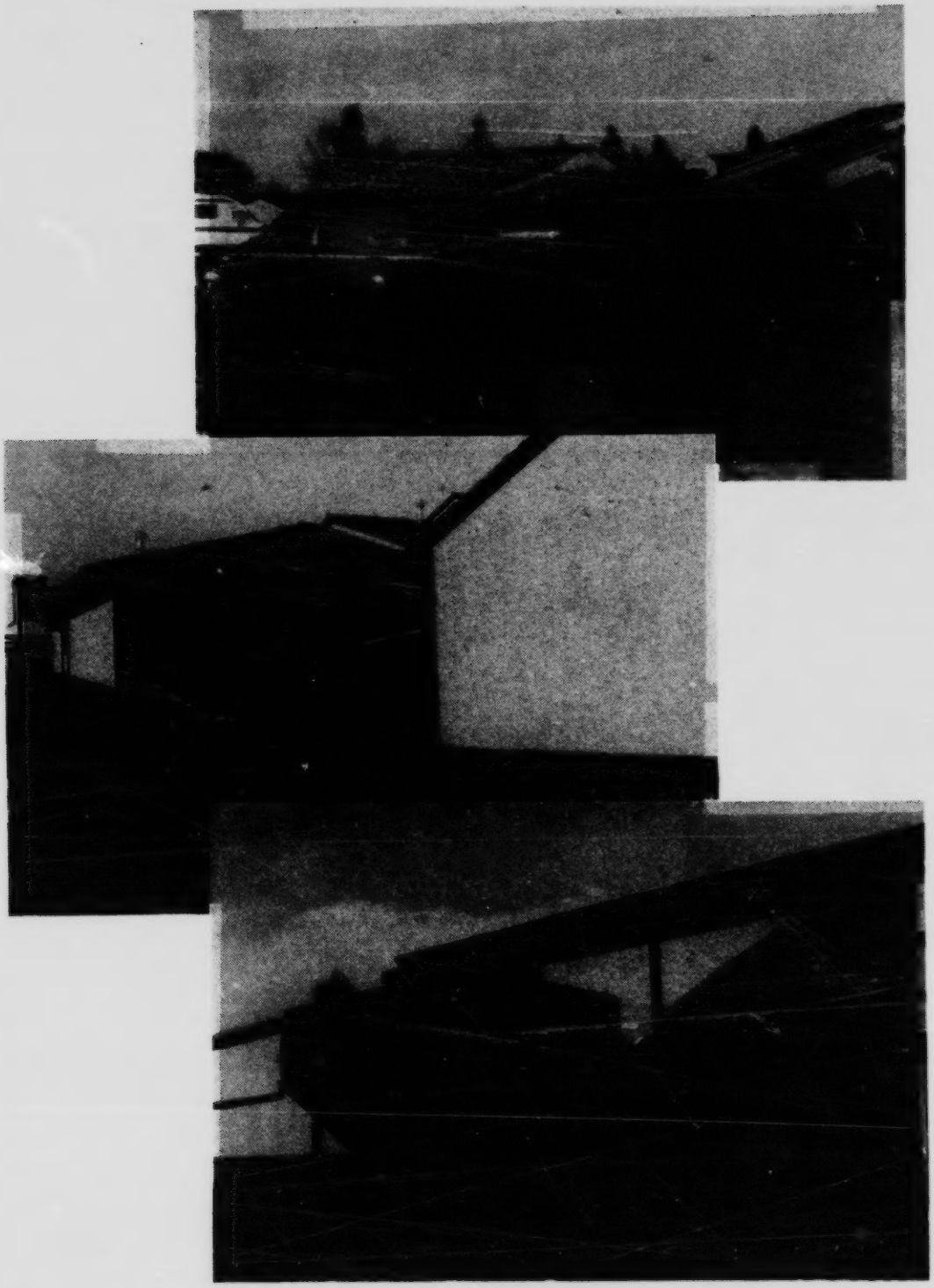


FIGURE 2.8 PARKVALE DOWNS



2.2.2 Design

Forty-one units, in Phases I and II, are grouped in five-, six-, and nine-unit clusters (see Figure 2.9, page 18). The development has detached, single garages with lane access. Units have full basements.

Three two-bedroom unit designs (see Figures 2.10, page 19, 2.11, page 20, and 2.12, page 21)—two bungalow styles and one two-story style—ranged from 98 to 118 square meters (1056 to 1270 square feet). Design changes were allowed; more extensive ones resulted in an increased price.

2.2.3 Marketing

Initially Parkvale Downs was difficult to sell because it was a new concept to Red Deer and because a model home was not yet built. With the construction of a model unit and extensive advertising, the project was pre-sold within a year. Radio ads were frequent and full-page advertisements were placed in the Advocate every weekend.

2.2.4 Management

Due to consumer demand, the project was sold as fee simple and offered an optional maintenance package. Although by-laws were not required, Avalon Homes did set minimal by-laws for the project. However, residents have experienced the need for a management association which is currently being organized to deal with project issues such as changing outdoor maintenance requirements.

2.2.5 Pricing

The base price ranged from approximately $76,900 to $95,000 depending on the model and location within the project.

FIGURE 2.9 PARKVALE DOWNS SITE PLAN

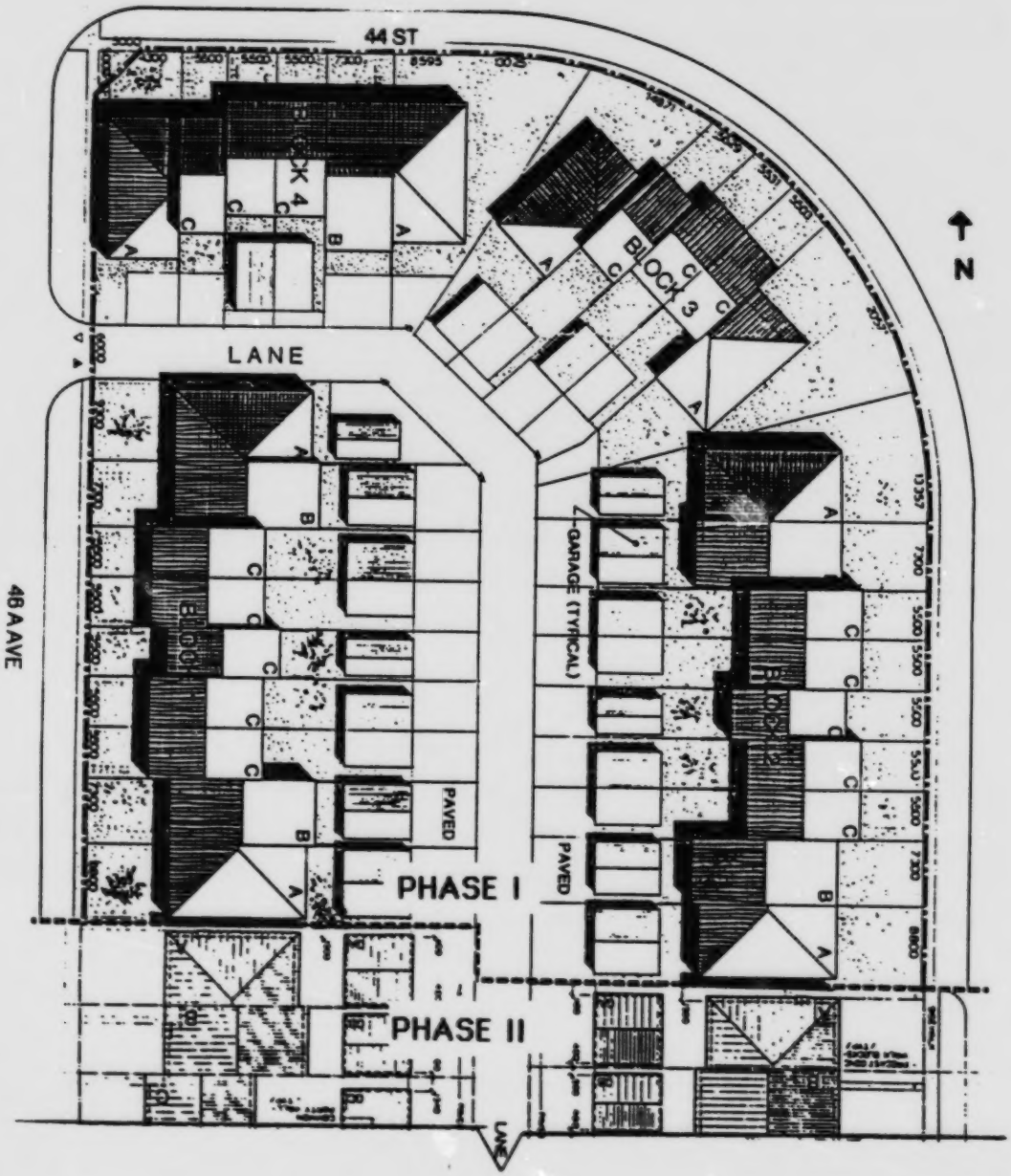
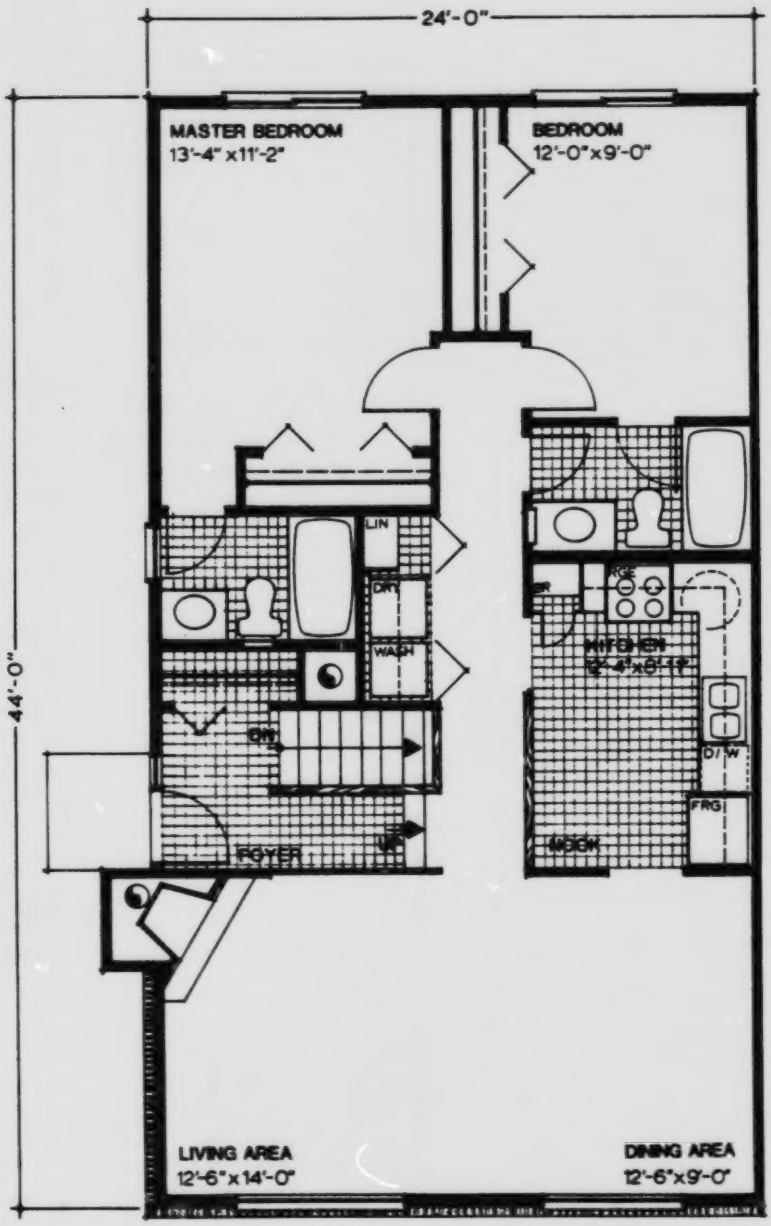


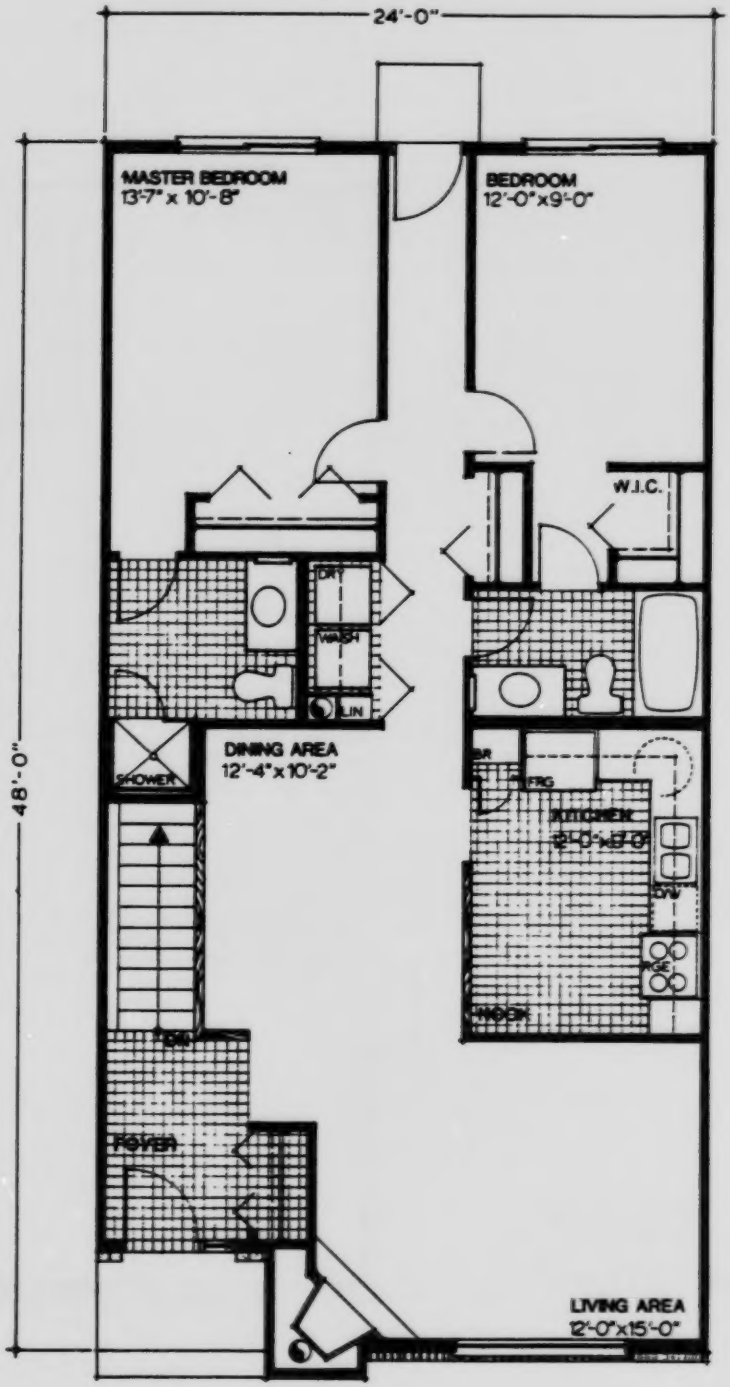
FIGURE 2.10 PARKVALE DOWNS FLOOR PLAN (UNIT A)



MAIN LEVEL
1056 SQ.FT.

PARK ROYALE
"A"

FIGURE 2.11 PARKVALE DOWNS FLOOR PLAN (UNIT B)

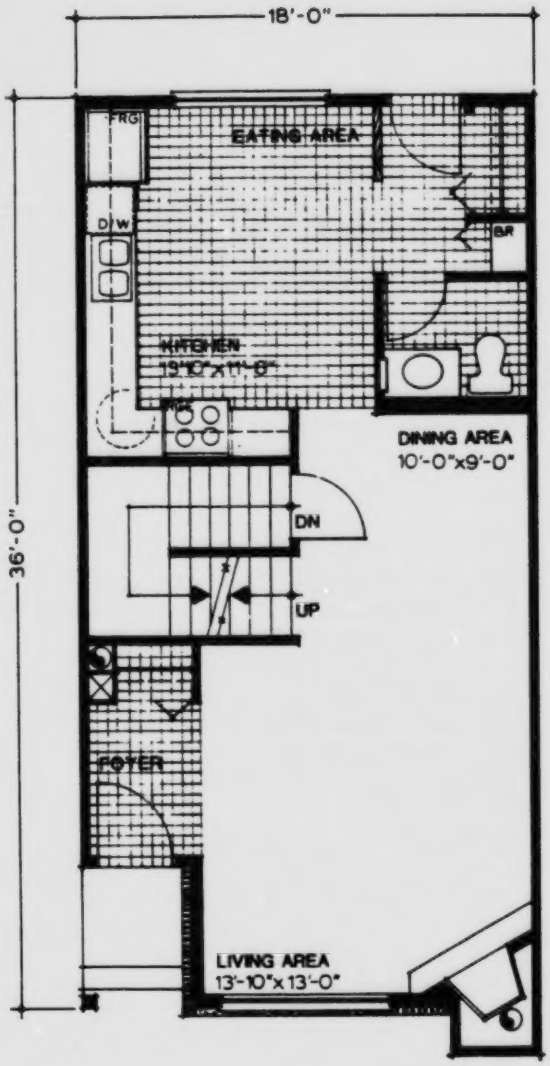


MAIN LEVEL
1120 SQ.FT.

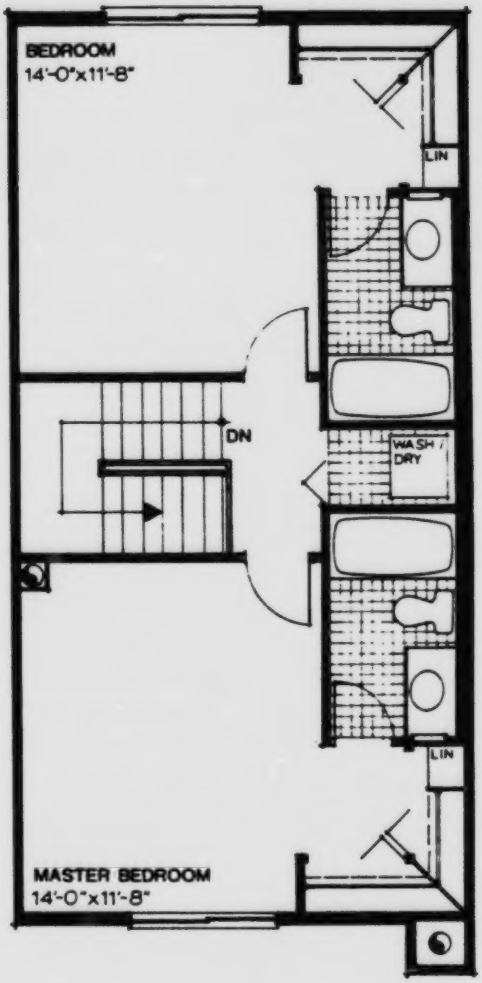
PARK MANOR

"B"

FIGURE 2.12 PARKVALE DOWNS FLOOR PLAN (UNIT C)



MAIN LEVEL
622 SQ. FT.



SECOND FLOOR
648 SQ.FT.

PARK HAMPTON

"C"

SECTION 3

RESEARCH METHODS

3.1 General Approach

3.2 Questionnaires

3.3 Interviews

3.4 Data Analysis

3.0 RESEARCH METHODS

Topics covered in this section include the research approach, the selected sample of senior homeowners, and the methods used to analyze the collected data.

3.1 General Approach

Two research methods—mail questionnaires and interviews—were used to collect primary data from individuals from four groups: project developers, project management associations, unit buyers, and individuals who considered buying but decided against the purchase of a Parkvale Downs unit. (It should be noted that there were no non-buyers of Parkvale Estates units per se. In fact, there was a sizeable waiting list of potential buyers.)

The research was conducted in two distinct stages. The first stage involved the preparation and mailing of a questionnaire which was sent to all buyers in both projects and to non-buyers of Parkvale Downs units. The follow-up stage involved personal interviews with individuals representing the developers, project management associations, and residents of Parkvale Estates and Parkvale Downs.

3.2 Questionnaires

The questionnaires to buyers were dropped off in resident mailboxes and returned to the association management within a week.

A list of non-buyers of Parkvale Downs units, provided by Avalon Homes, was used to contact people who were interested in Parkvale Downs but chose for some reason not to purchase. Questionnaires were mailed to these non-buyers. In all, 47 were sent to residents in Parkvale Estates, 41 to residents of Parkvale Downs, and 100 (8 of which were returned because of a subsequent move) to non-buyers of Parkvale Downs units.

3.3 Interviews

Personal interviews were arranged with the following key individuals:

— Mr. Bill Mittelmeyer, project supervisor and President of Parkvale Estates Society;

— Mr. Steve Scott, President of Avalon Homes;

— Mrs. L. Phillips, Chairperson, Parkvale Downs Resident Association; and

— Mr. Vernon Parker, Associate Planner, City of Red Deer Planning Department.

Personal interviews were also conducted with residents who volunteered through the mail questionnaires to participate in an in-depth interview about retirement housing. The in-depth interviews were used to obtain qualitative information about important issues which arose through the survey. In all, interviews were conducted with eight representatives of Parkvale Estates and interviews were held with seven representatives of Parkvale Downs.

A summary of the interviews is provided in Section 9.

3.4 Data Analysis

Questionnaire responses were computer-coded and analyzed using SPSS-X, a computer program for the social sciences. Frequencies were obtained for all questions in the buyer and non-buyer surveys. As well, many cross-tabulations and t-tests (see Appendix C for definitions) were analyzed to determine if there were any significant differences between the two Parkvale projects, or between buyers and non-buyers.

SECTION 4

RESPONSDENT PROFILES

4.1 Who Answered the Survey?

4.2 Housing Characteristics

4.3 Respondent Characteristics

4.0 RESPONDENT PROFILES

This section profiles respondents by their housing characteristics (that is type of residence, length of residence, tenure, and mortgage) and by personal characteristics (that is marital status, age, education, employment, occupation, ethnic background, health, travel, number of vehicles, and income) for buyers and non-buyers of Parkvale units. The information presented in this report highlights major findings of the study; detailed data in response to specific questions in the survey may be found in Appendix A. As well, any statistically significant differences within the following groups are indicated in the appropriate sections:

- Buyers of Parkvale Estates and Parkvale Downs,
- Buyers of Parkvale units and non-buyers of Parkvale Downs,
- Buyers of Horizon Village units and Parkvale units, and
- Non-buyers of Horizon Village units and Parkvale Downs units.

Tables representing statistically significant differences may be found in Appendix B.

It should be noted that the complete results of a study focusing on three early Horizon Village projects in Edmonton are contained in a report entitled Ownership Retirement Housing Projects in Alberta available from the Research and Development Section of Alberta Municipal AFfairs.

4.1 Who Answered the Survey?

4.1.1 Buyers

Thirty-seven buyer households completed a mail questionnaire (see Appendix A). More specifically, 22 (of a potential 47 units) responded from Parkvale Estates and 15 (of a potential 41 units) from Parkvale Downs. This response rate for buyers (47% in Parkvale Estates and 37% in Parkvale Downs) and non-buyers (28%) was excellent. (A good response to mail surveys ranges from 10 to 20 percent.)

Female respondents living in Parkvale Estates outnumbered males by a ratio of 2:1. About one-third of the units are owned by females who live alone. Female respondents living in Parkvale Downs outnumbered males by a ratio of 1.6:1. The percentage of widowed, divorced, or separated females declines from Parkvale Estates to Parkvale Downs which is likely due to the drop in the average age of each of their respective groups.

Couples were encouraged to complete the survey together, and as a result, approximately one-third of the buyer questionnaires were answered as a couple.

4.1.2 Non-buyers

Twenty-six non-buyer households completed the mail questionnaire. Female respondents outnumbered males by a ratio of 1.3:1. Only 12 percent of the non-buyers, compared to 38 percent of the buyers, were widowed.

Again, couples were encouraged to complete the non-buyer survey together and about one-half complied.

4.2 Housing Characteristics

4.2.1 Tenure

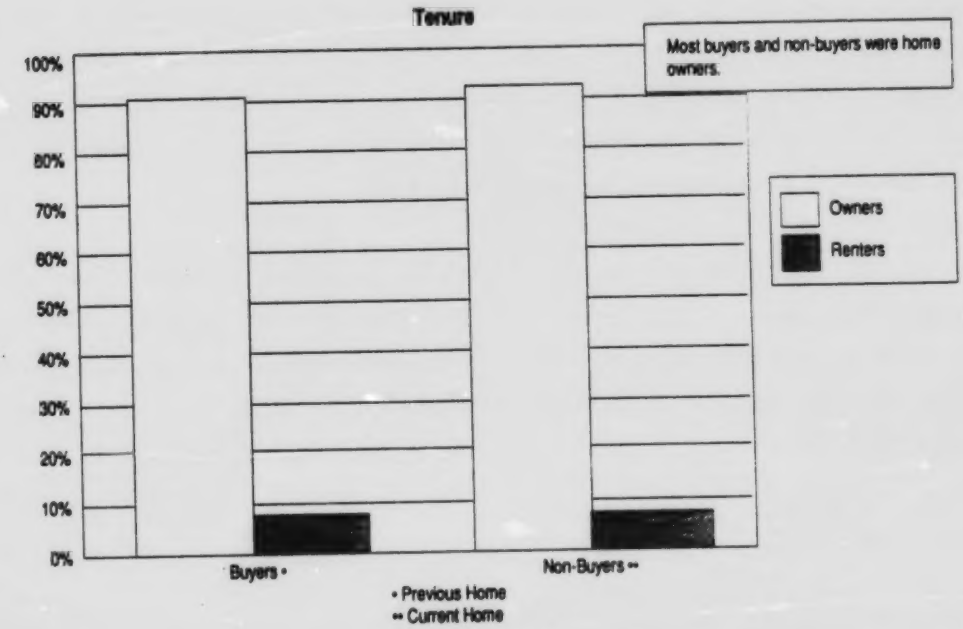
Over 90 percent of buyers and non-buyers owned their own homes (see Figure 4.1, page 28). More specifically, all buyers of Parkvale Estates owned their previous homes compared to 80 percent of Parkvale Downs buyers.

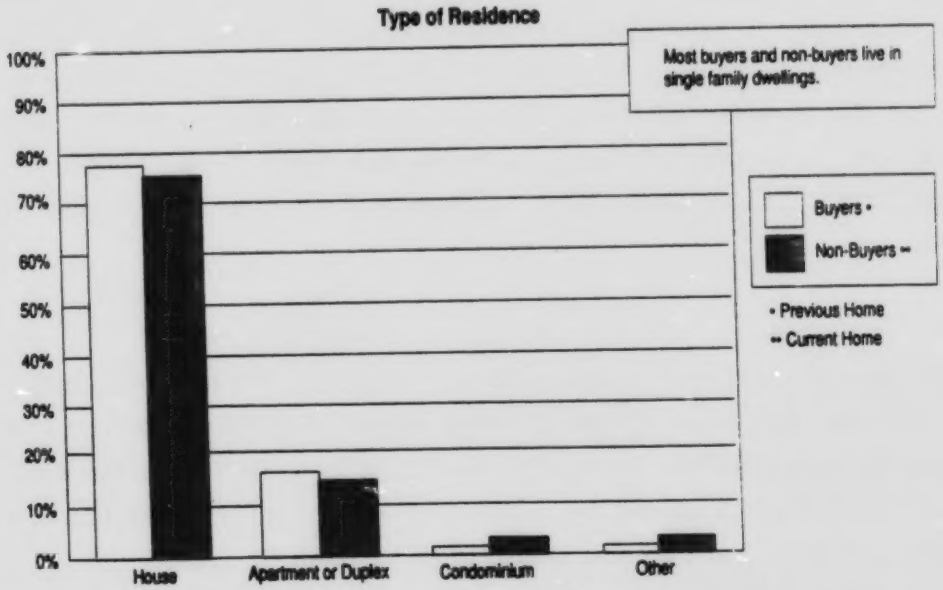
4.2.2 Types of Residence

About three-quarters of buyers previously lived in single family dwellings prior to moving to Parkvale Estates or Parkvale Downs. This figure is similar for non-buyers—about 75 percent now live in single family homes (see Figure 4.1, page 28).

FIGURE 4.1 HOUSING CHARACTERISTICS

(Tenure/Type of Residence)





4.2.3 Length of Tenancy

On average, nearly half (46%) of the Parkvale buyers lived in their previous homes for more than twenty years (see Figure 4.2, page 30). There was a significant difference, however, between Parkvale Estates and Parkvale Downs buyers. Two out of three Parkvale Estates buyers lived in their previous homes for more than twenty years. In comparison, only one in five Parkvale Downs buyers had lived in their previous homes for more than twenty years.

One in four non-buyers in Red Deer have been in their current homes for more than twenty years. Fifty percent of Red Deer non-buyers have lived in their current home for only ten years or less. By comparison, of Edmonton non-buyers in the Horizon Village study, the majority (78%) had lived in their homes for eleven years or more.

4.2.4 Mortgage

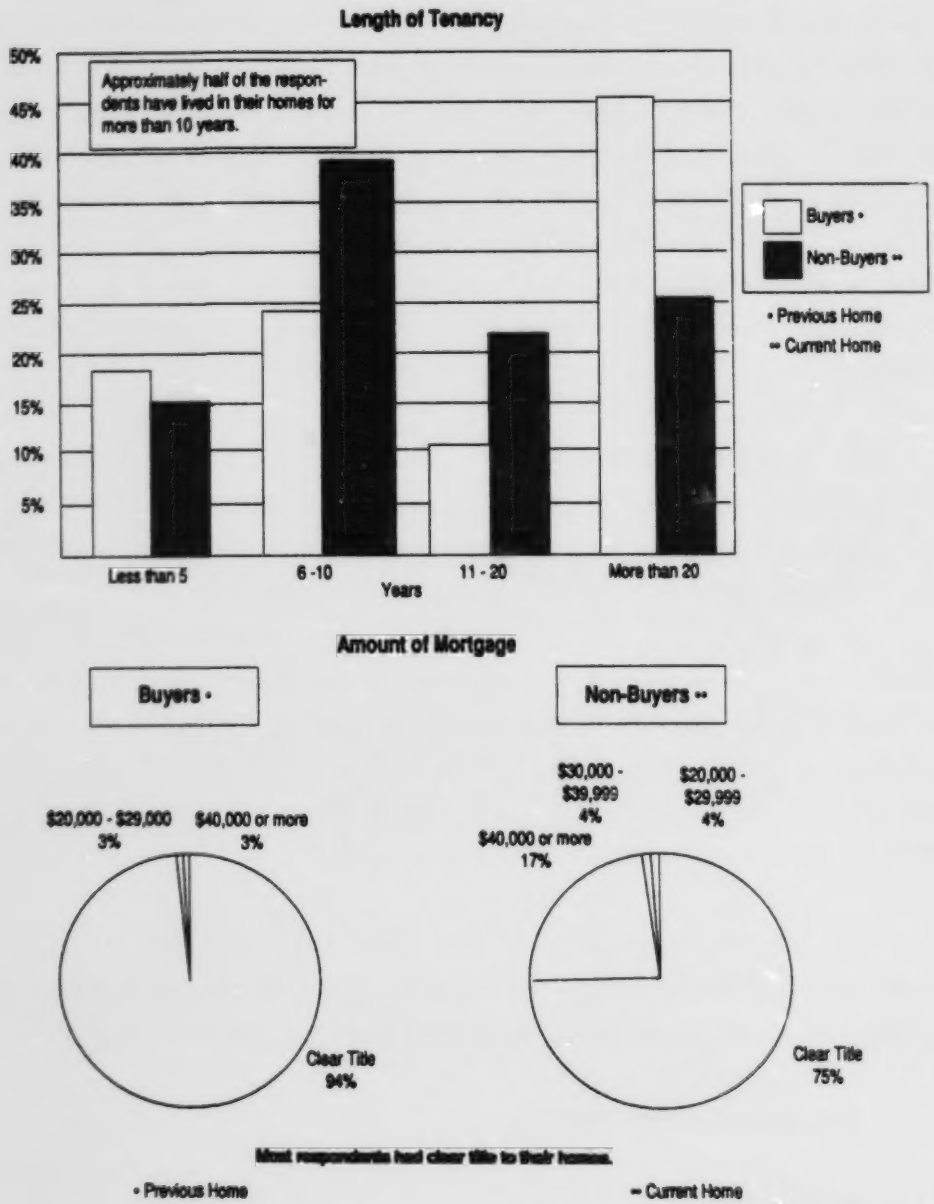
Over 90% of buyers had clear title to their previous homes (see Figure 4.2, page 30). There was a significant difference, however, between Parkvale Estates and Parkvale Downs buyers in terms of their mortgage status after buying units. None of the Parkvale Estates respondents took a mortgage on their units. In comparison, 31 percent of Parkvale Downs buyers mortgaged $40,000 or more on their units. Fewer—three in four—non-buyers have clear title to their present homes.

There was a significant difference in the amount paid for a Parkvale unit compared to the value of the buyer's previous home. Two-thirds of Parkvale Estates buyers paid less than the value of their previous homes, compared to only 23 percent of Parkvale Downs buyers. It should be noted that Parkvale Estates was a self-help project which was developed by a group of seniors and was therefore sold at a much lower price, but they also tended to "move down."

Most buyers sold their previous homes when they purchased a Parkvale unit.

FIGURE 4.2 HOUSING CHARACTERISTICS

(Length of Tenancy/Amount of Mortgage)



4.2.5 Home Size

There was a statistically significant difference between Parkvale Estates and Parkvale Downs buyers in that Estates buyers (91%) tended to buy smaller units than their previous home size. Less than half (46%) of Parkvale Downs buyers purchased units smaller than their previous homes and nearly half considered the units to be of appropriate size. Size of unit reflects affordability. While the majority of Parkvale buyers considered the units to be affordable, nearly one-third of Parkvale Estates buyers compared to only 13 percent of Parkvale Downs buyers indicated they bought their unit to gain money from the sale of their previous home. This money is often used for retirement activities such as travel.

On average, three out of four Parkvale buyers purchased units smaller than their previous homes. In Edmonton, only one out of two purchasers of Horizon Village units bought smaller units. This may be due to the limited number of retirement housing options available at the time.

Parkvale buyers have smaller homes than the non-buyers (see Figure 4.3, page 32). Nearly three-quarters of the buyers bought units which were smaller than their previous homes. Again, this relates to such factors as affordability (particularly in retirement), the retirement housing choices available, the decreasing need for a larger home, and the maintenance required.

On average, the majority (69%) of Red Deer non-buyers live in larger homes than Edmonton non-buyers (61% versus 31%), who felt the retirement units were too expensive. This feeling likely arose from their existing home equity.

4.3 Respondent Characteristics

4.3.1 Marital Status

The majority of buyers (57%) and non-buyers (69%) were married (see Figure 4.4, page 33). There were, however, more widowed buyers (38%) compared to

FIGURE 4.3 SIZE OF HOME

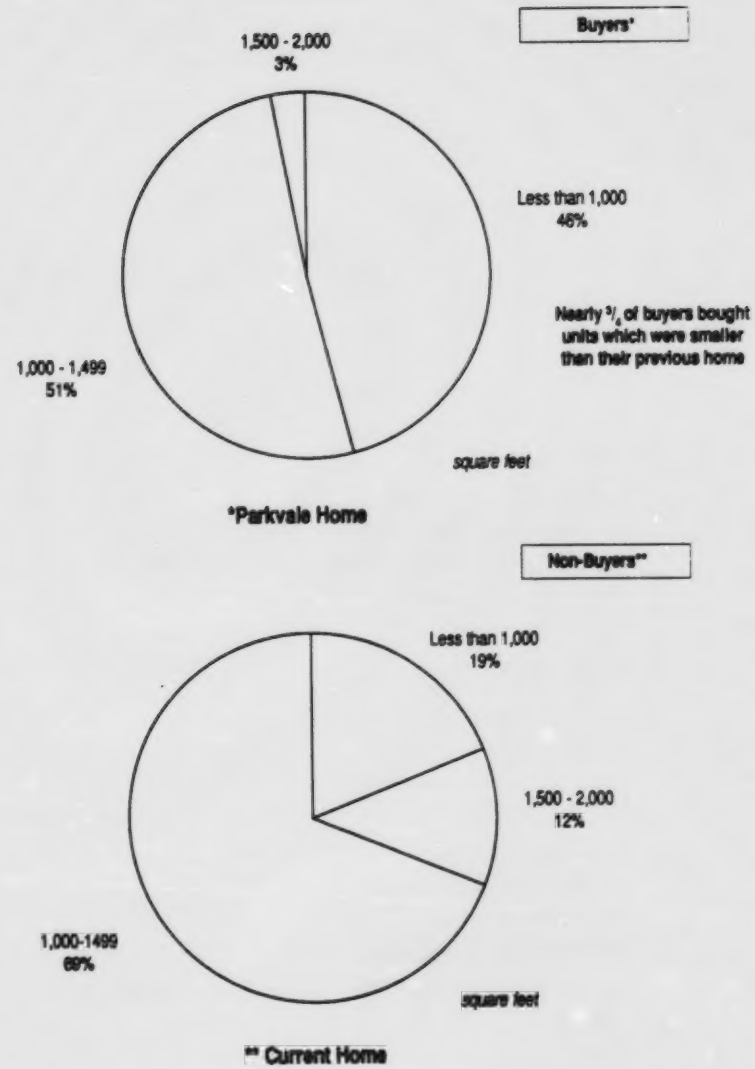
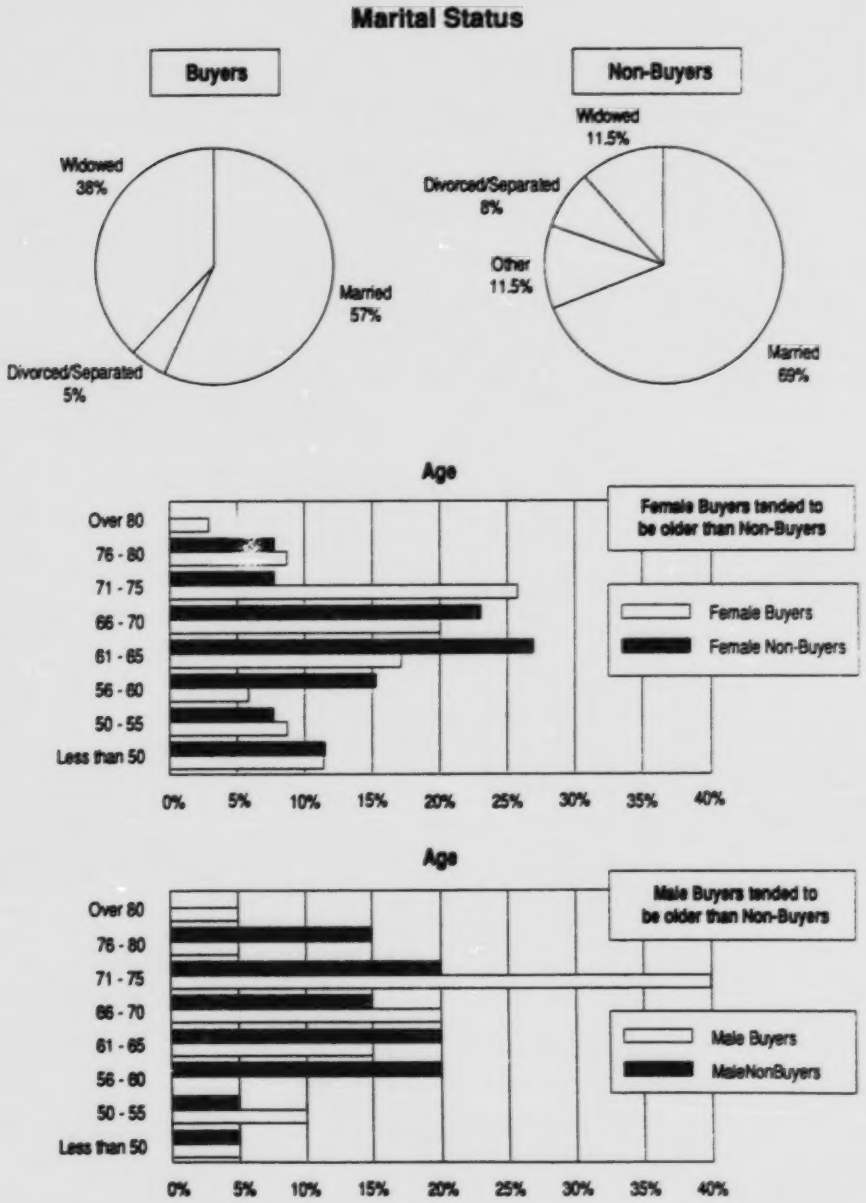


FIGURE 4.4 RESPONDENT CHARACTERISTICS

(Marital Status/Age)



widowed non-buyers (12%). Many widowed people bought into a retirement village because of lower maintenance, to be with similar people, and for companionship.

4.3.2 Age

On average, the majority of female buyers (63%) were between 61 and 75 years of age. The majority of male buyers (60%) were somewhat older—between 66 and 75 (see Figure 4.4, page 33).

There was a statistically significant difference between the ages of Parkvale Estates and Parkvale Downs buyers. The Downs respondents were younger on average. The majority of Downs female buyers were less than 55 compared to the majority of Estates female buyers who were between 66 and 75.

The majority of Parkvale Downs male buyers were under 65 compared to Estates buyers, the majority of which were between 66 and 75. According to the developer of Parkvale Downs, the average age of buyers for the project was 55.

It should be noted that Parkvale Estates was restricted to buyers 55 and over, Parkvale Downs to those 45 and over.

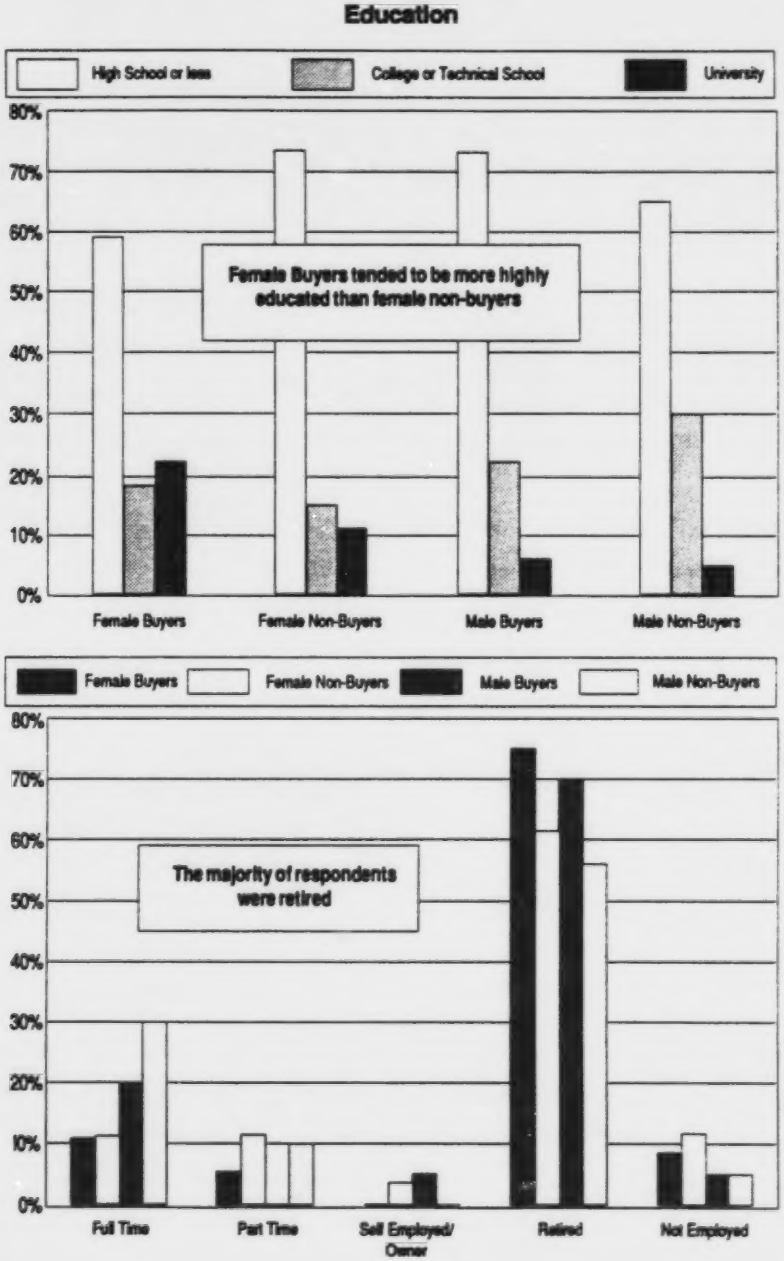
Non-buyers tended to be younger than buyers—only 15 percent of non-buyers were over 70 years of age compared to 37 percent for buyers.

4.3.3 Education

The majority of respondents received a high school (or less) education (see Figure 4.5, page 35). A higher percentage of Parkvale Downs versus Parkvale Estates buyers received a college, technical school, or university education. This reflects in part the fact that Parkvale Downs buyers are younger on average. It should be noted that the older respondents were raised at a time when education was not as important, or as available, as it is today.

FIGURE 4.5 RESPONDENT CHARACTERISTICS

(Education/Employment)



4.3.4 Current Employment

The majority of respondents are retired (see Figure 4.5, page 35). There was a significant difference between Parkvale Estates and Parkvale Downs respondents in terms of current employment. All respondents of Parkvale Estates are retired while nearly half (43%) of Parkvale Downs residents are still employed.

4.3.5 Occupation

The majority of female buyers (63%) and non-buyers (54%) indicated occupations other than homemaker as their primary lifetime occupation (see Figure 4.6, page 37).

Females tended to be in professional or clerical positions. Males were most frequently in professional, sales, or skilled jobs.

4.3.6 Ethnic Background

Approximately one-half of the buyers, compared to two-thirds of non-buyers, were of British Isle ancestry (that is Irish, English, or Scottish) (see Figure 4.7, page 38).

4.3.7 Health

The majority of respondents were in satisfactory health (see Figure 4.8, page 39). Buyers, particularly males, tended to be in poorer health than non-buyers, and one-quarter indicated health as a reason for moving.

4.3.8 Travel

Over 80 percent of respondents travelled outside Alberta last year (see Figure 4.9, page 40). In fact, nearly one-third of Parkvale buyers travelled more since purchasing a Parkvale unit. Buyers travelled for longer periods than did non-buyers. Only half the buyers, compared to 82 percent of non-buyers, were away

FIGURE 4.6 RESPONDENT CHARACTERISTICS

(Occupation Male/Female)

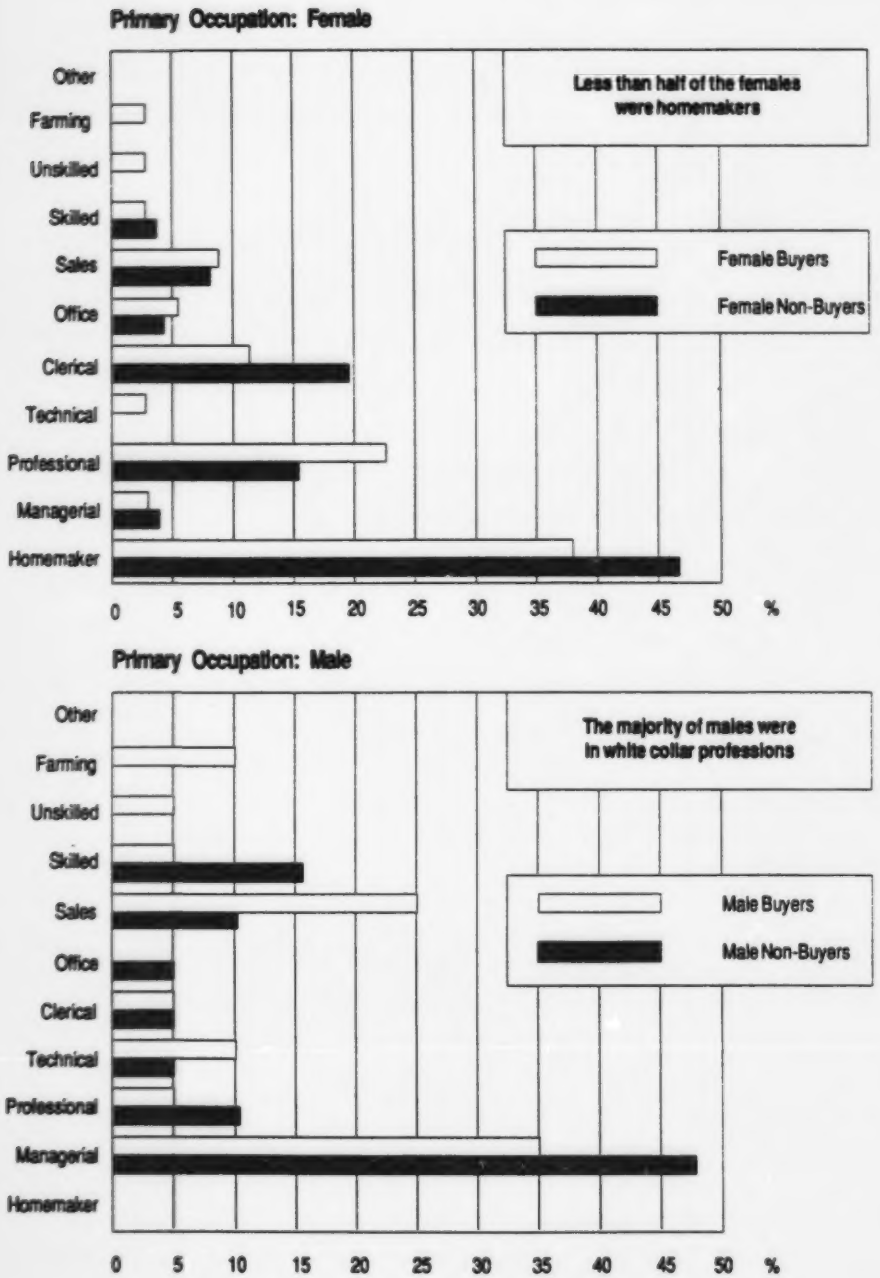
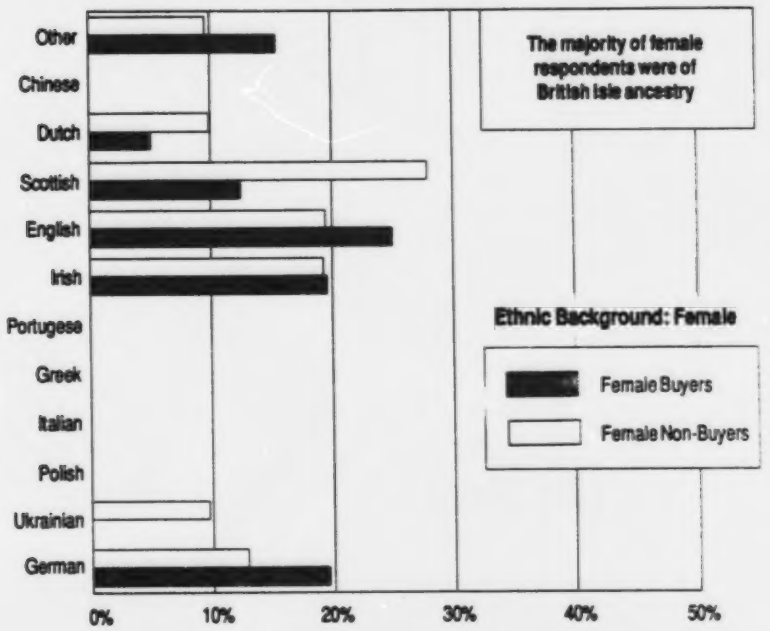


FIGURE 4.7 RESPONDENT CHARACTERISTICS

(Ethnic Background)



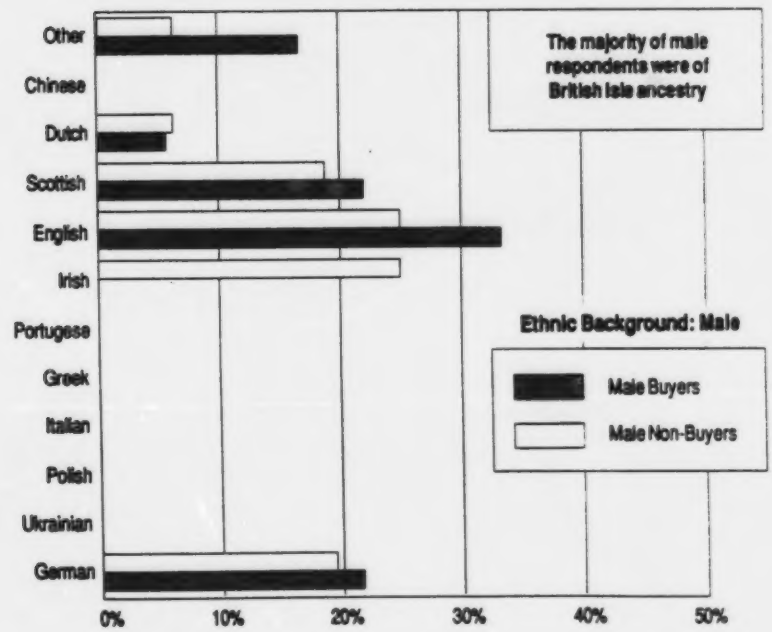


FIGURE 4.8 RESPONDENT CHARACTERISTICS

(Health Status)

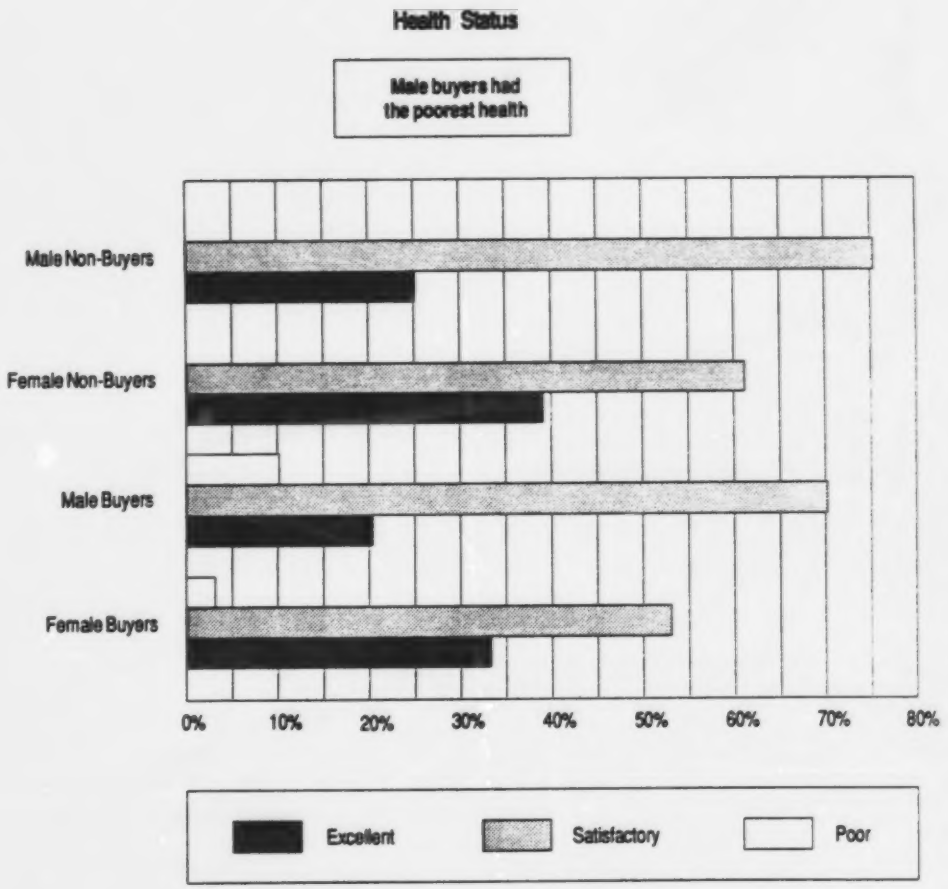
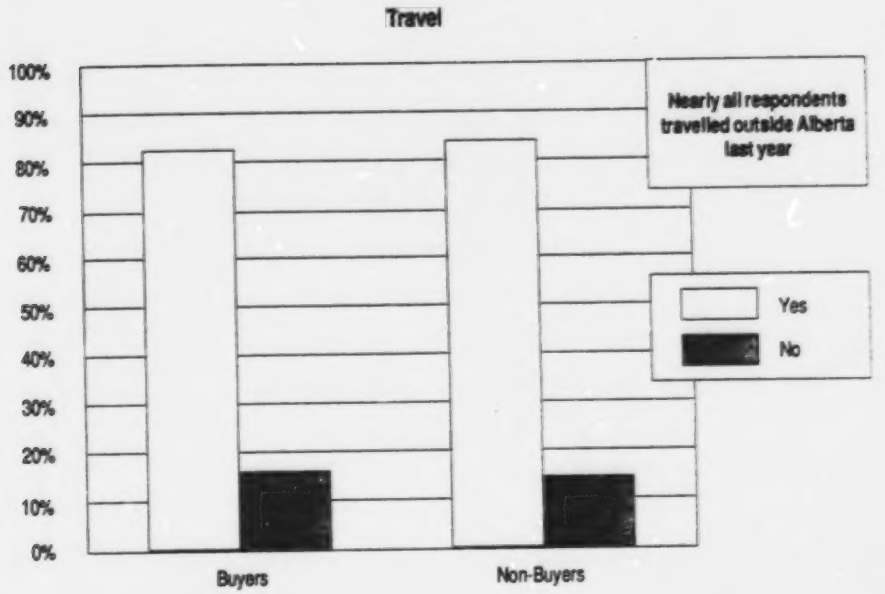
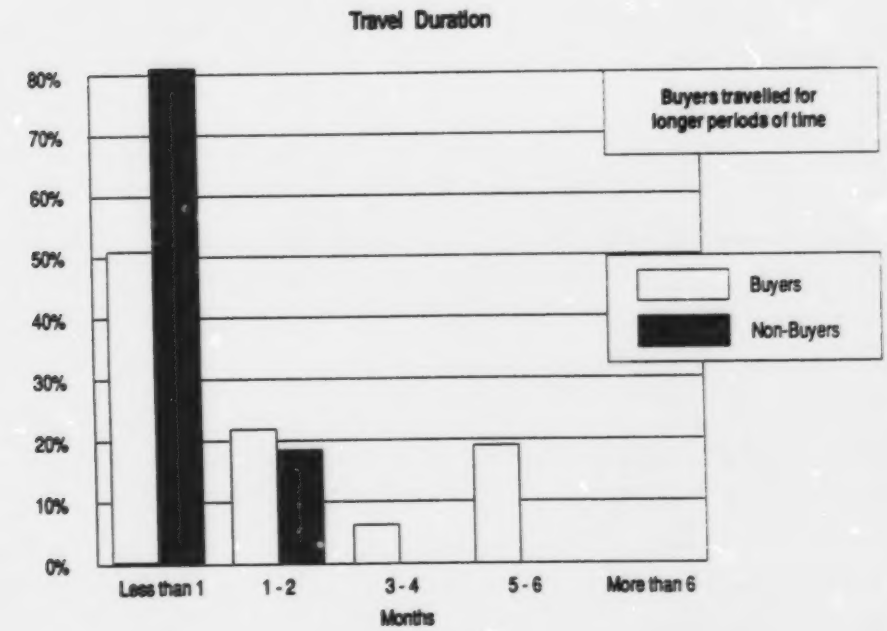


FIGURE 4.9 RESPONDENT CHARACTERISTICS

(Travel/Travel Duration)





less than one month. Nearly one-third of Parkvale Estates buyers were away between three and six months. Many residents spend the winter in the southern United States.

Red Deer buyers travelled for significantly longer periods than Edmonton buyers. One-quarter of Parkvale buyers were away between three to six months, while 94 percent of Horizon Village buyers were away two months or less.

There was also a significant difference between Edmonton and Red Deer non-buyers. Edmonton non-buyers travelled for slightly longer periods—the majority between one and two months compared to the majority of Red Deer non-buyers who travelled less than one month.

4.3.9 Number of Vehicles

Although the majority of respondents own one vehicle, approximately one-third own two (see Figure 4.10, page 42).

4.3.10 Income

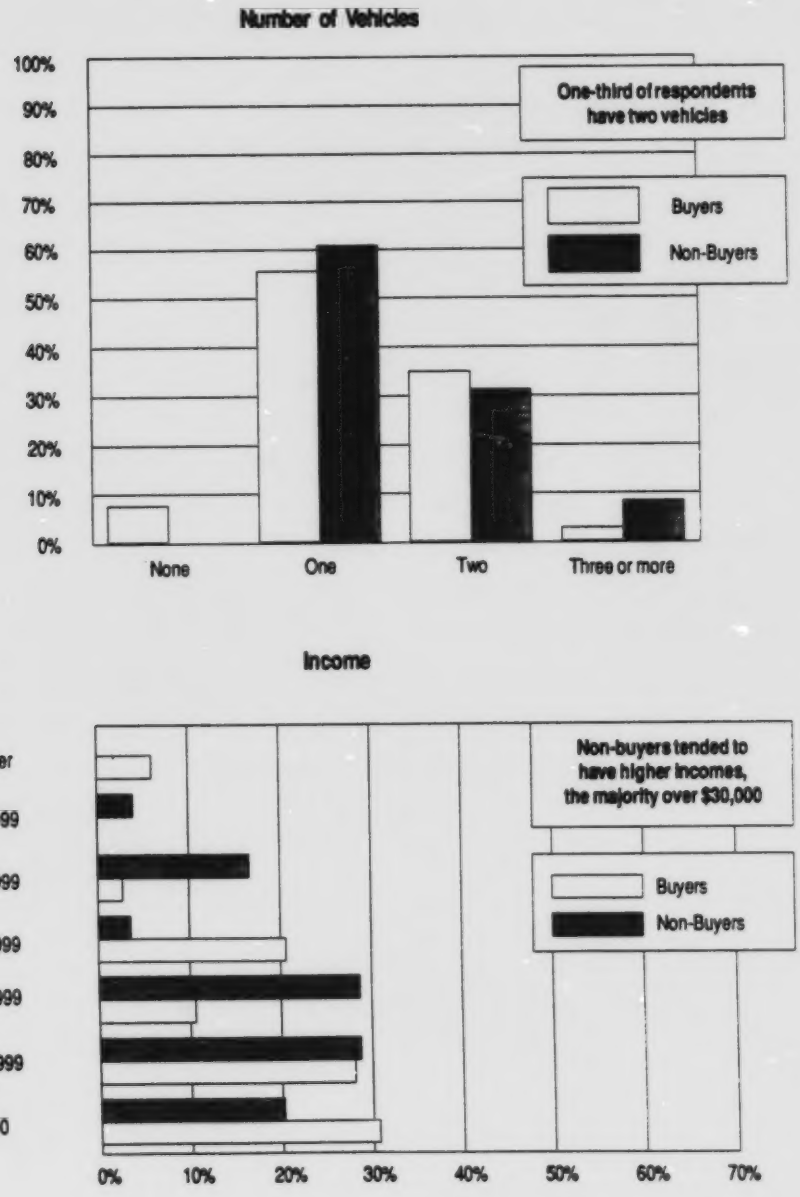
On average, the majority (59%) of Parkvale buyers had incomes under $30,000 (see Figure 4.10, page 42). However, there was a significant difference between Parkvale Estates and Parkvale Downs buyers. Almost nine out of ten Estates buyers had incomes under $40,000 while nearly six out of ten Downs buyers had incomes of more than $40,000. This may be partly explained by the greater number of Downs respondents who are still working.

Non-buyers had slightly higher incomes—the majority were under $40,000 compared to under $30,000 for buyers.

In summary, buyers and non-buyers of Parkvale units had a number of similarities in terms of their demographic and socioeconomic characteristics, as well as their housing situations. The following differences were noted among the various groups (that is Parkvale Estates respondents, Parkvale Downs respondents, Horizon Village respondents, and buyers and non-buyers):

FIGURE 4.10 RESPONDENT CHARACTERISTICS

(Number of Vehicles/Income)



— There were more rural buyers than non-buyers.

— Parkvale Estates buyers lived in their previous homes longer than did Parkvale Downs buyers or non-buyers.

— More Parkvale Downs buyers than Parkvale Estates buyers took a mortgage on their units.

— One-quarter of Parkvale non-buyers still carry a mortgage.

— Most Parkvale Estates buyers paid less for their units than the value of their previous homes. This is due partially to lower cost which is the result of the self-help approach and to the purchase of smaller units.

— More Parkvale Estates buyers "moved down" (that is in terms of unit cost and unit space) compared to Parkvale Downs or Horizon Village buyers.

— There are more widowed buyers than widowed non-buyers.

— Parkvale Estates buyers are older on average than are Parkvale Downs buyers or non-buyers.

— All Parkvale Estates respondents are retired; half of Parkvale Downs respondents are still working. This results in Parkvale Downs respondents having higher incomes than Parkvale Estates respondents.

— Parkvale Estates buyers travelled for longer periods than did Parkvale Downs buyers, non-buyers, or Horizon Village buyers.

SECTION 5

THE DECISION PROCESS

5.1 Housing Needs and Expectations

5.2 What Alternatives were Considered?

5.3 Sources of Parkvale Information on Projects

5.4 How Long Did Residents Look?

5.5 What Influenced the Decision to Buy?

5.6 The Final Decision

5.0 THE DECISION PROCESS

Housing needs change as families enter later stages of the life cycle. "Empty nesters" and retired people often experience dissatisfaction with their home because it no longer meets these new needs. These consumers then seek to find housing which does. This forces them to establish priorities and trade-offs among housing features which offer (or are expected to offer) the greatest satisfaction or benefit.

In making a decision to move, consumers go through several stages in the decision-making process. These stages, as related to housing decisions, typically include the following:

- determining housing needs,
- establishing expectations (important home features),
- identifying housing alternatives,
- evaluating the alternatives,
- selecting the new home, and
- evaluating the choices in terms of their level of satisfaction.

This chapter is organized on the basis of the decision process described above and summarizes survey findings in terms of the following topics:

- needs and expectations,
- alternatives considered and preferred types of housing,
- sources of retirement housing information,
- search time,
- influencing factors, and
- the final decision.

The final stage of the decision process--choice evaluation--will be discussed in the following section. The information presented in this section highlights major findings of the study; detailed data for specific survey questions may be found in Appendix A. In addition, any statistically significant differences between

residents of Parkvale Estates and Parkvale Downs, between residents of Horizon Village and Parkvale, or between buyers and non-buyers, are indicated within the appropriate sections. Tables indicating statistical differences are provided in Appendix B.

5.1 Housing Needs and Expectations

Changing housing needs were explored through survey questions on reasons for moving (buyers) or considering a move (non-buyers). Figure 5.1 (page 47) provides reasons for moving. In addition, Parkvale respondents were asked to rank their five most important reasons for considering a move.

Parkvale buyers and non-buyers indicated "too much outdoor maintenance" as the primary reason for moving. Buyers and non-buyers differed on the remaining four rankings of reasons for moving or reasons which would prompt a move.

The following reasons for moving were ranked by buyers:

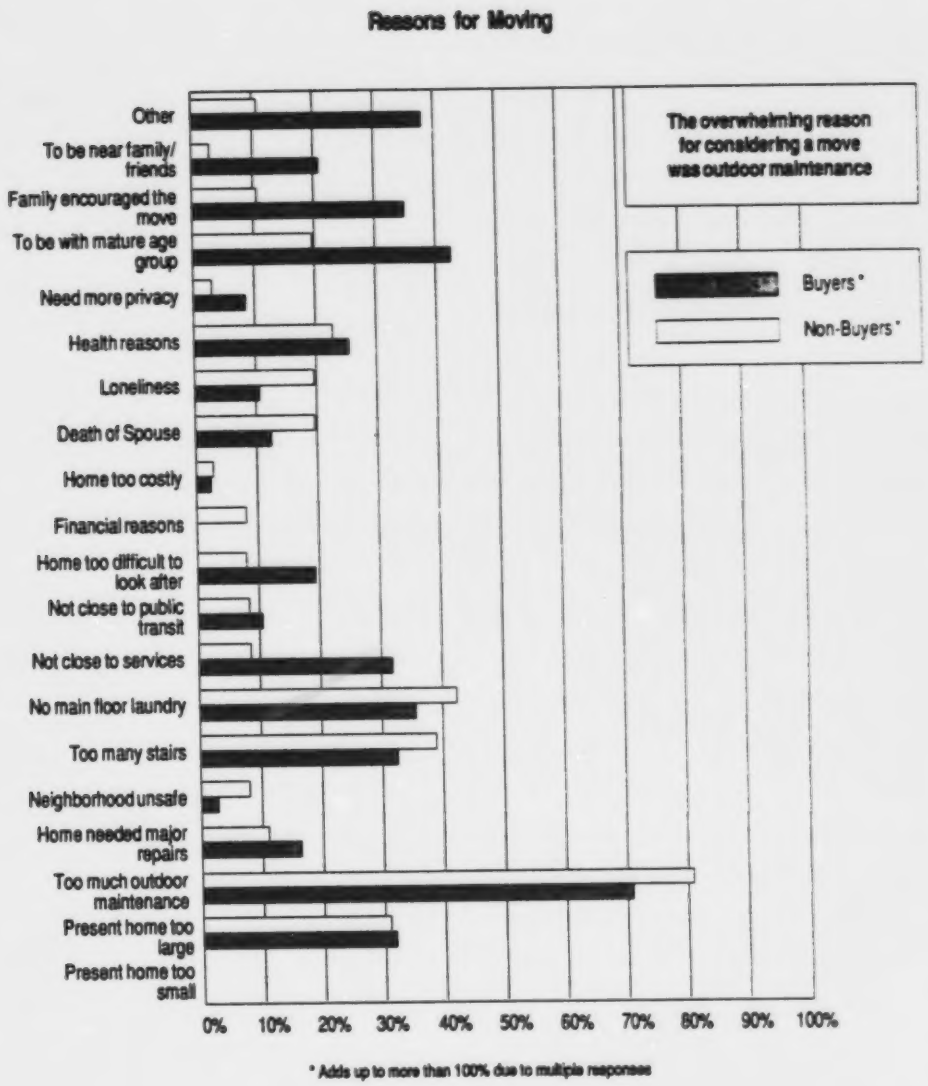
- #2 wish to be with mature age group,
- #3 family encouraged the move,
- #4 & 5 too many stairs, and
  previous home was too large.

The following reasons for moving were ranked by non-buyers:

- #2 no main floor laundry facilities,
- #3 too many stairs,
- #4 present home is too large,
- #5 death of a spouse, and health reasons (tied).

The reasons for all groups in Edmonton or Red Deer for moving was too much outdoor maintenance. However, the most important reasons for considering a move by Parkvale residents reflect the following changing housing needs of buyers and non-buyers:

FIGURE 5.1 REASONS FOR MOVING



- to be with a mature age group,
- health reasons,
- present home was too large,
- home needs major repair,
- home difficult to look after,
- no main floor laundry,
- family encouraged the move,
- too many stairs,
- death of a spouse,
- not close to community services, and
- to be near family and friends.

The above reasons for considering a move are not necessarily in order of general importance, but are dependent on various factors such as the locality, age, income, lifestyle, and health of respondents. Developers of retirement projects should consider such factors in designing and marketing for this specialized market.

Table 5.1 (page 49) indicates how important specific home features were to Parkvale buyers and non-buyers. Although buyers and non-buyers had similar expectations about the home which would meet their needs, there were several statistically significant differences.

The following features were more important to Parkvale Estates buyers than to Parkvale Downs buyers:

- view;
- patio area;
- attached garage;
- no steps, single level, and few stairs;
- low maintenance;
- storage;
- lever-type faucets;
- bathroom safety bars;
- emergency call button or system;
- wheelchair access;

TABLE 5.1

IMPORTANCE* OF HOME FEATURES

(BUYERS AND NON-BUYERS)

FEATURES	BUYERS[a]	BUYERS[b]	NON-BUYERS
Location			
Distance to transit stop	2.1	2.5	2.1
Distance to place of worship	2.4	2.9	2.3
Distance to health services	1.8	2.3	2.3
Distance to shopping/services	1.9	2.1	2.1
Distance to family/friends	2.1	2.5	2.5
Distance to parks/lakes	2.4	2.2	2.5
Quiet neighborhood	1.5	1.6	1.6
Lot			
Privacy	1.5	1.8	1.6
Size	1.6	1.9	1.7
View	1.5	2.0	1.7
Landscaping	1.5	1.9	1.6
Directions facing (exposure)	1.7	1.8	1.7
Exterior of Home			
Patio area	1.6	2.0	2.0
Attached garage	1.4	2.3	1.2
Parking	1.7	1.8	1.4
No steps	1.4	2.5	1.7
Low maintenance	1.3	2.4	1.5
Covered entrance	2.3	2.3	1.6
Type of windows	1.8	1.9	1.6

(Continued Next Page)

*Average (mean) score, where 1 = very important
2 = important
3 = unimportant
4 = very unimportant

a = Parkvale Estates buyers
b = Parkvale Downs buyers

TABLE 5.1 (CONTINUED)

IMPORTANCE* OF HOME FEATURES

(BUYERS AND NON-BUYERS)

FEATURES	BUYERS[a]	BUYERS[b]	NON-BUYERS
Interior of Home			
Efficient floor plan	1.4	1.4	1.3
Good use of space	1.4	1.4	1.3
Full basement	3.8	1.9	2.1
Single level/bungalow	1.4	2.1	1.5
Sun room	2.5	3.0	2.4
Few stairs	1.5	2.5	1.7
Convenient kitchen	1.4	1.7	1.4
Kitchen cupboards	1.4	1.6	1.3
Laundry area	1.5	1.6	1.5
Storage	1.5	1.9	1.4
Lighting	1.6	1.5	1.6
Electrical outlet convenience	1.5	1.6	1.4
Lever-type door handles	2.4	2.9	2.5
Lever-type faucets	2.0	2.8	2.3
Bathroom safety bars	1.7	2.9	2.2
Flooring	1.6	1.7	1.5
Optional Features			
Fireplace	3.3	2.4	2.7
Whirlpool	3.3	3.3	2.8
Air conditioning	2.9	3.2	2.3
Emergency call button	2.8	3.3	2.4
Alarm system	2.0	2.6	2.0
Wheelchair access	2.4	3.2	2.7
Amenities			
Near recreational facilities	1.7	2.2	2.6
Near social activities	1.6	2.3	2.4

*Average (mean) score, where 1 = very important
2 = important
3 = unimportant
4 = very unimportant

a = Parkvale Estates buyers
b = Parkvale Downs buyers

- near social activities; and
- near recreational facilities.

Of more importance to Parkvale Downs buyers were:

- a full basement, and
- a fireplace.

Although the issue was not tested, the above differences in importance of housing features seem to be age-dependent. Parkvale Estates residents are, on average, older than Parkvale Downs residents. As one ages, housing features which ease aging-in-place become more important to seniors.

There also were significant differences between buyer and non-buyer expectations of home features. It should be noted that non-buyers were those individuals who looked at Parkvale Downs. The following features were most important to non-buyers:

- attached garage,
- covered entrance,
- full basement,
- air-conditioning, and
- emergency call button or system.

Parkvale Downs does offer a covered entrance and full basement.

In comparing Horizon Village buyers in Edmonton with Red Deer buyers, the following features were significantly more important to the Edmonton buyers:

- attached garage,
- low maintenance,
- covered entrance, and
- full basement.

In comparing Edmonton and Red Deer non-buyers, the following features were of more importance to the Red Deer non-buyers:

- view,
- patio,
- no steps, and
- air-conditioning.

In summary, the general home features in order of importance for each group of respondents were as follows:

Parkvale Estates	Parkvale Downs	Non-Buyers
Lot	Lot	Exterior
Exterior	Interior	Lot
Amenities	Exterior	Interior
Interior	Location	Location
Location	Amenities	Options
Options	Options	Amenities

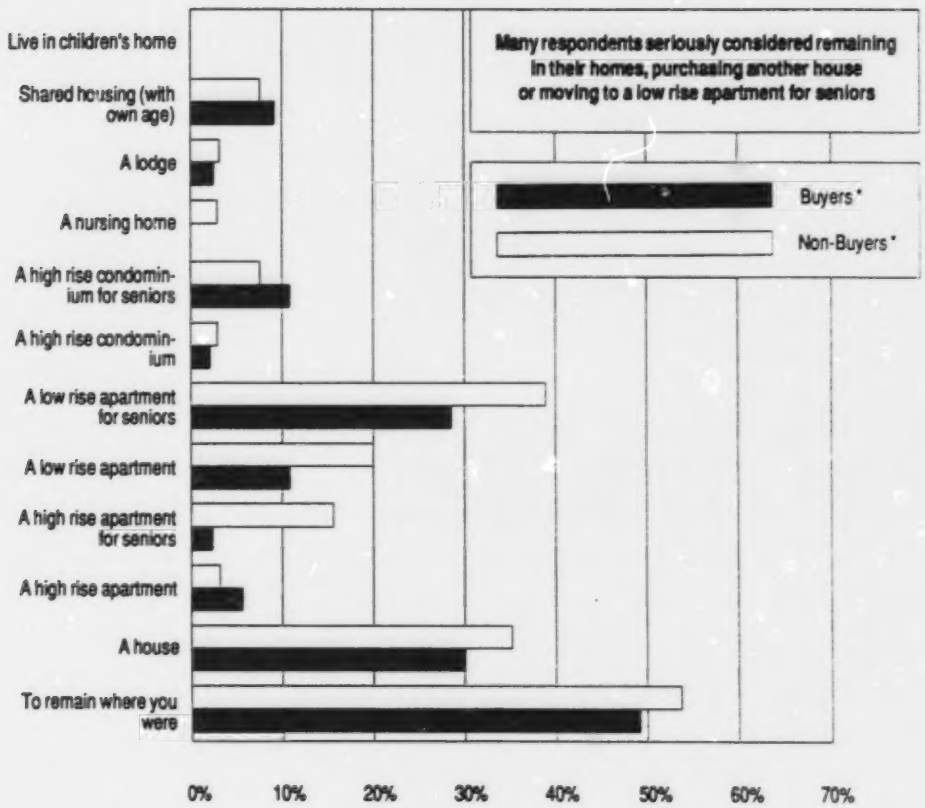
Listed optional features were unimportant to buyers. Amenities tend to become more important to fully retired owners. The range of responses given to each item or feature listed in Table 5.1 (page 49) is included in the buyer and non-buyer questionnaires provided in Appendix A.

5.2 What Alternatives were Considered?

Approximately half of the buyers and non-buyers had seriously considered remaining in their own home (see Figure 5.2, page 53). About one-third had also seriously considered another house or a low-rise apartment for seniors. Very few buyers or non-buyers considered high-rise apartments, nursing homes, or shared housing with a similar age group. None of the respondents had considered living with their children.

Buyers were questioned about the degree of their involvement in determining the design features of their Parkvale home. There was a significant difference

FIGURE 5.2 HOUSING CONSIDERATIONS



* Adds up to more than 100% due to multiple responses

between Parkvale Estates and Parkvale Downs buyers. Most (80%) of Parkvale Downs buyers were able to choose only the interior features/options of their unit. In contrast, because of the self-help approach in Parkvale Estates, buyers were fully involved in the design and development of their project.

5.3 Sources of Parkvale Information on Projects

There was a significant difference in the source of information about the Parkvale projects. Parkvale Estates was most commonly heard about through family or friends (see Figure 5.3, page 55). One-third of Parkvale Downs buyers heard about the project through a newspaper ad, one-third from family or friends. In contrast, nearly 70% of non-buyers saw an advertisement in a newspaper.

5.4 How Long Did Residents Look?

Half the buyers searched for a new home between one and four weeks; over three-quarters for under one year (see Figure 5.3, page 55). (It should be noted that the limited search time of one to four weeks is not typical for buyers of retirement housing. The limited number of housing options in Red Deer in 1984 may have contributed to their rapid decision.) On the other hand, three-quarters of the non-buyers had been searching for more than a year. Several non-buyers did indicate that they had not found a suitable alternative, were not ready to move yet, or were not seriously searching for an alternative home at this time.

5.5 What Influenced the Decision to Buy?

Buyers and non-buyers were asked to check off features which were applicable to their decision making. As part of the same question (see Appendix A), respondents were also asked to rank the five most important factors from their checklist.

Housing factors which influenced respondents' decisions to buy or not buy are provided in Table 5.2, page 56. The five most important housing factors ranked by Parkvale Estates buyers as influencing their decision were as follows:

FIGURE 5.3 INFORMATION SEARCH

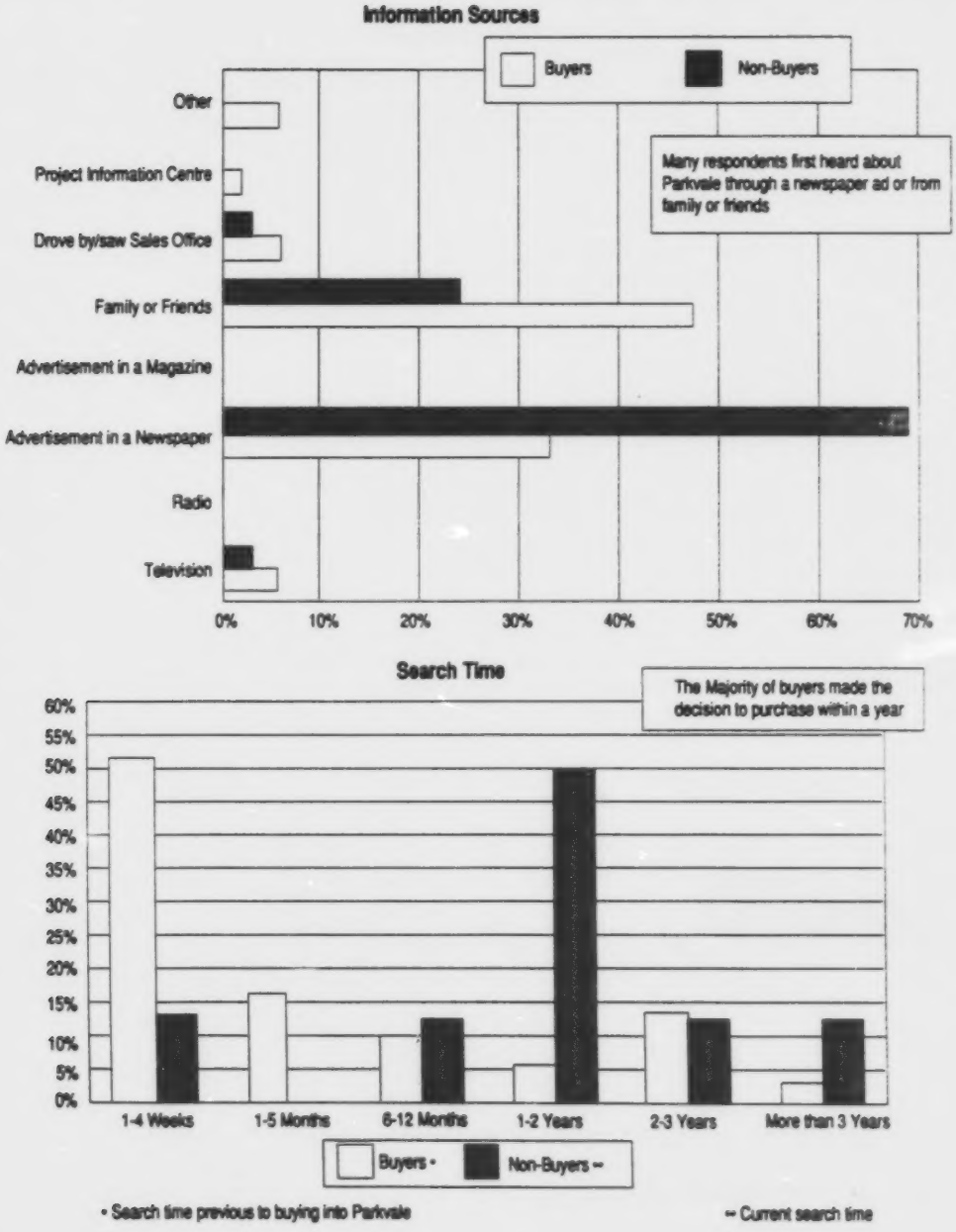


TABLE 5.2

IMPORTANCE OF INFLUENCING FACTORS

(BUYERS AND NON-BUYERS)

	FACTORS	BUYERS*	NON-BUYERS*
1.	Initial cost	1.6	1.5
2.	On-going/monthly costs	1.9	1.9
3.	Close to current neighborhood	2.6	3.1
4.	Close to family/friends	2.3	2.8
5.	Close to public transportation	2.3	2.3
6.	Social activities	2.2	2.4
7.	Recreational activities	2.1	2.3
8.	Restricted to age 50+	1.9	1.9
9.	Safety/security features	1.4	1.5
10.	Design of individual unit	1.7	1.6
11.	Parking	1.9	1.5
12.	Appearance of the buildings	1.8	1.8
13.	Maintenance-free exteriors	1.7	1.4
14.	Close to health services	1.9	2.3
15.	Close to shopping	1.9	2.1
16.	Opportunity for ownership	1.8	2.1
17.	Purchasing in a new complex	2.0	2.3
18.	Resale value	1.8	1.7
19.	No children allowed	2.0	2.0
20.	Quality of construction	1.6	1.4

IMPORTANCE**		
The most important reason	# 1	# 1
The 2nd most important reason	# 9	# 13
The 3rd most important reason	# 13	# 10
The 4th most important reason	# 8, 20 (tie)	# 2
The 5th most important reason		# 20

*Average (mean) score, where 1 = very important,
2 = important,
3 = unimportant,
4 = very unimportant.

**As ranked by respondents

- #1 initial cost,
- #2 maintenance-free exteriors,
- #3 safety and security features,
- #4 & 5 restricted to age 55+, and quality of construction (tied)

The five most important housing factors ranked by Parkvale Downs buyers were:

- #1 & 2 safety and security features, and
  design of individual unit (tied).
- #3 & 4 initial cost, and
  close to family and friends (tied), and
- #5 on-going/monthly costs,
  restricted to age 45+, and quality of construction (tied).

Non-buyers ranked the following housing factors which would be important influences on their decision to purchase:

- #1 initial cost,
- #2 maintenance-free exteriors,
- #3 design of individual units,
- #4 on-going/monthly costs, and
- #5 quality of construction.

The following factors were more important to Parkvale Estates buyers than to Parkvale Downs buyers:

- close to public transportation,
- social activities,
- recreational activities,
- maintenance-free exterior, and
- opportunity for ownership.

The above factors reflect the higher average age of Parkvale Estates residents and the fact that a higher percentage were previously homeowners.

There were two significant differences between buyers and non-buyers in Red Deer:

- buyers felt it was more important to be near their current neighborhood, and
- parking was more important to non-buyers.

In comparing Edmonton and Red Deer respondents, the following significant differences were noted:

- a maintenance-free exterior was more important to Horizon Village buyers than to Parkvale buyers (many buyers in Parkvale Downs chose not to take advantage of the optional maintenance package), and
- on-going or monthly costs were of more concern to Edmonton than to Red Deer non-buyers (this reflects condominium versus fee simple ownership).

In regard to the buying decision, over 80 percent of the buyers made the decision to buy a Parkvale unit on their own. An adult child was a major influence on buyers in 20 percent of the purchases in Parkvale Estates. All non-buyers made the decision not to buy into Parkvale Downs on their own.

5.6 The Final Decision

Buyers and non-buyers were asked to check off reasons for buying (or not buying) which were applicable to their decision. As part of the same question, respondents were also asked to rank the five most important reasons from their checklist.

The most important reasons for moving to Parkvale (see Table 5.3, page 59) as ranked by buyers were as follows:

- #1 convenient location,
- #2 & 3 mature adult community, and no outdoor maintenance (tied),
- #4 worry-free travel, and
- #5 affordable.

TABLE 5.3

REASONS FOR BUYING INTO PARKVALE ESTATES

OR PARKVALE DOWNS

	REASONS	BUYERS* (%)
1.	Mature community (50+)	87
2.	Companionship	41
3.	Worry-free travel	60
4.	Community spirit	49
5.	Independence maintained	76
6.	Gained money from home sale	24
7.	With similar people	54
8.	Suitable lifestyle	65
9.	Forced by family to purchase	5
10.	More leisure time	51
11.	Living costs reduced	41
12.	Affordable	71
13.	Pride of ownership	65
14.	Good resale value	78
15.	Safety/physical security	62
16.	Attractive complex	84
17.	Nothing else like Parkvale available	51
18.	A new place	68
19.	Convenient location	95
20.	No outdoor maintenance	62
21.	Recreation building	N/A
22.	Social activities	22
23.	Country atmosphere	14
24.	Several floor plans available	51
25.	Good size	78
26.	Easy to housekeep	95
27.	Special design for seniors	54
28.	No children	49
29.	Recreational vehicle storage	11
30.	Other	3

IMPORTANCE**	
The most important reason	# 19
The 2nd most important reason	# 1, 20 (tie)
The 3rd most important reason	
The 4th most important reason	# 3
The 5th most important reason	# 12

*Add to more than 100% because of multiple responses

**As ranked by respondents

A higher percentage of Parkvale Estates buyers compared to Parkvale Downs buyers selected the following reasons for buying a Parkvale unit:

- companionship,
- worry-free travel,
- community spirit,
- independence maintained,
- gained money from previous home sale,
- suitable lifestyle,
- affordable,
- pride of ownership,
- no outdoor maintenance,
- social activities,
- country atmosphere, and
- special design features for seniors.

Many of the above reasons are reflected again in the higher average age of Parkvale Estates residents.

In comparison, the most important reasons for not moving into Parkvale Downs, as ranked by non-buyers (see Table 5.4, page 61), were as follows:

- #1 liked Parkvale Downs, but not ready to move yet,
- #2 & 3 too expensive (initial cost), and
  too small (tied),
- #4 would prefer a single detached house, and
- #5 units too crowded together.

Non-buyers were questioned about how long they intended to live in their present home (see Appendix A). Several indicated that they did not know. Other answers were as follows:

TABLE 5.4

REASONS FOR NOT BUYING INTO PARKVALE DOWNS

	REASONS	NON-BUYERS (%)
1.	Like Parkvale Downs/not ready yet	85
2.	Not a good location	4
3.	Would prefer to rent	12
4.	Would prefer a single detached house	19
5.	Do not want to live in a 50+ community	8
6.	Not enough privacy	8
7.	Too expensive (initial cost)	31
8.	On-going/monthly costs too high	12
9.	Not a suitable lifestyle	4
10.	Forced by family not to purchase	4
11.	Not good resale value	15
12.	Not an attractive complex	4
13.	Units too crowded together	19
14.	New, prefer something more established	0
15.	No outdoor gardening	12
16.	No suitable floor plans/options available	12
17.	Our choice sold out	12
18.	Too small	35
19.	Too large	0
20.	No special design features for seniors	8
21.	Too many restrictions in Parkvale	12
22.	Quality of construction	4
23.	Other	19

IMPORTANCE**	
The most important reason	# 1
The 2nd most important reason	# 7, 18 (tie)
The 3rd most important reason	
The 4th most important reason	# 4
The 5th most important reason	# 13

*Add to more than 100% because of multiple responses

**As ranked by respondents

- "as long as I can look after it,"
- "until we get market value (for our house),"
- "as long as possible,"
- "I would move tomorrow if my present house could be taken in trade on a Parkvale Downs unit,"
- "until I find more suitable housing,"
- "until health and other circumstances dictate a move," and
- "2-10 years."

The major difference between Horizon Village buyers compared to Parkvale buyers was the fact that Red Deer buyers ranked "convenient location" versus "no outdoor maintenance" as the most important reason for moving to the project.

In summary, although housing needs change as families age, approximately half of the respondents had seriously considered remaining in their own homes or buying another home as options to meeting changing needs. Respondents expressed outdoor maintenance as a primary reason for moving, yet this problem could be solved by hiring a yard maintenance company. Empty-nesters and seniors are also attracted to a "better lifestyle" which includes such features as an affordable home, low outdoor maintenance, convenient location, mature adult setting, security, and worry-free travel.

Builders should focus on the needs, expectations, and preferences of this mature market to offer a better housing product. Housing factors which commonly influence the buying decision include: initial cost, maintenance-free exteriors, safety and security features, unit design, and quality of construction.

In marketing retirement housing, builders must realize that most seniors do not have an urgent need to move. It takes a long time to make the decision to move and many visits to the show home and/or sales office. Sales people need to be patient and less "hard sell." Selling may also focus on children of seniors.

Word-of-mouth is a common source of information in this market and satisfied owners are an important source of additional sales. Further, seniors who are involved in the design aspects of a project tend to be happier with their new home.

SECTION 6

LEVEL OF RESIDENT SATISFACTION

6.1 Were Housing Needs, Expectations, and Preferences Met?

6.2 Satisfaction with Project Design

6.3 Satisfaction with Unit Design

6.4 Satisfaction with Neighborhood Amenities

6.5 Satisfaction with Project Management

6.6 Overall Satisfaction with Parkvale

6.0 LEVEL OF RESIDENT SATISFACTION

Respondents in Parkvale Estates and Parkvale Downs were questioned regarding the level of satisfaction with their homes. In anticipation that there might be differences between projects, statistical tests were performed on each aspect of satisfaction. It should be noted that both projects have been occupied for approximately one and one-half years.

This chapter summarizes survey findings related to the following topics:

- meeting housing needs, expectations, and preferences;
- satisfaction with the project;
- satisfaction with the unit design;
- satisfaction with the surrounding amenities; and
- satisfaction with the project management.

The information presented in this chapter highlights major findings of the survey; detailed data for specific survey questions may be found in Appendix A.

6.1 Were Housing Needs, Expecations, and Preferences Met?

6.1.1 Expectations and Preferences

Section 5 provided survey findings on housing expectations (that is importance of home features) for buyers of Parkvale units. This section highlights the most important home features and compares them to the level of satisfaction with such features.

Buyers preferred to remain in their previous homes or to live in an environment which was similar to a single family dwelling. As demonstrated by their purchase into Parkvale Estates and Parkvale Downs, respondents also prefer to own their own home.

6.1.2 Needs

As indicated in the previous section, housing needs were explored through survey questions on reasons for moving from their previous homes. The most important reasons were:

- too much outdoor maintenance,
- preference to be with a mature age group,
- family encouraged the move,
- previous home too large, and
- too many stairs.

Reasons for moving to Parkvale included:

- convenient location,
- no outdoor maintenance,
- mature adult community,
- worry-free travel, and
- affordable.

In comparing the above lists, two important needs were met by moving to Parkvale—no outdoor maintenance and a mature adult community. As mentioned in Section 4, on average three out of four Parkvale buyers purchased units smaller than their previous homes (nearly all Parkvale Estates buyers purchased smaller units). Approximately half the buyers paid less than the value of their previous home—thus meeting the affordability expectation.

In summary, residents' most important housing needs seem to have been met by moving to Parkvale Estates or Parkvale Downs.

6.2 Satisfaction with the Project Design

Satisfaction with the project design is discussed in terms of project location, attributes, and lot characteristics.

Table 6.1 (page 67) notes the level of satisfaction with each home feature both for Parkvale Estates and Parkvale Downs buyers.

6.2.1 Location

Locational features of a home were generally important to buyers, particularly a quiet location. (Proximities to services for each project are discussed in detail in Section 9). Both Parkvale Estates and Parkvale Downs residents were very satisfied with the locational features of their projects.

6.2.2 Lot

Lot features were felt to be important to most buyers when considering a new home. The level of satisfaction with these aspects of Parkvale was on the average between "very satisfied" and "somewhat satisfied" (see Table 6.1, page 67). However, there were two significant differences between Parkvale Estates and Parkvale Downs. Parkvale Estates respondents were more satisfied with their view (the project is adjacent to Bower Park) and their landscaping than were Parkvale Downs residents. It should be noted that view and landscaping were also more important features/expectations for Parkvale Estates buyers when looking for a new home.

6.3 Satisfaction with Unit Design

Satisfaction with unit design is discussed in terms of the following key elements: exterior of the home, interior of the home, and optional features.

6.3.1 Exterior of Home

Expectations about the exterior aspects of the home were generally important—although Parkvale Estates respondents had higher expectations for "an attached garage," "no steps," "single level," "few stairs," and "no maintenance." Although Parkvale buyers were generally satisfied with the exterior features of their homes, Parkvale Estates residents were more satisfied with "no steps," "few stairs,"

TABLE 6.1

LEVEL OF HOUSING SATISFACTION*

FEATURES	BUYERS[a]	BUYERS[b]
Location		
Distance to transit stop	1.8	1.5
Distance to place of worship	1.4	1.6
Distance to health services	1.1	1.2
Distance to shopping/services	1.1	1.2
Distance to family/friends	1.2	1.3
Distance to parks/lakes	1.1	1.1
Quiet neighborhood	1.0	1.2
Lot		
Privacy	1.3	1.5
Size	1.2	1.5
View	1.2	1.8
Landscaping	1.1	1.6
Direction facing (exposure)	1.1	1.3
Exterior of Home		
Patio area	1.3	1.7
Garage	1.2	1.6
Parking	1.7	1.7
No steps	1.1	N/A
Maintenance	1.3	2.3
Covered entrance	1.9	1.9
Type of windows	1.2	1.8

(Continued Next Page)

* Average (mean) score, where 1 = very satisfied
2 = somewhat satisfied
3 = not satisfied

a = Parkvale Estates buyers
b = Parkvale Downs buyers

TABLE 6.1 (CONTINUED)

LEVEL OF HOUSING SATISFACTION*

FEATURES	BUYERS[a]	BUYERS[b]
Interior of Home		
Efficient floor plan	1.1	1.4
Good use of space	1.1	1.5
Full basement	N/A	1.3
Single level (bungalow)	1.0	1.5
Sun room	2.0	2.0
Few stairs	1.0	1.8
Convenient kitchen	1.0	1.3
Kitchen cupboards	1.0	1.4
Laundry area	1.1	1.6
Storage	1.6	1.5
Lighting	1.1	1.7
Electrical outlet convenience	1.1	1.4
Lever-type door handles	1.3	N/A
Lever-type faucets	1.1	N/A
Bathroom safety features	1.2	N/A
Flooring	1.1	1.9
Optional Features		
Fireplace	N/A	1.5
Whirlpool	N/A	N/A
Air conditioning	N/A	N/A
Emergency call button	1.0	N/A
Alarm system	1.3	N/A
Wheelchair access	1.3	2.0
Amenities		
Recreational facilities	1.6	1.1
Open outdoor spaces	1.4	1.2
Social activities	1.5	1.6
Management		
Owner's association	1.5	1.9
Involvement opportunities	1.5	2.0
Fees	1.2	N/A
General restrictions	1.3	1.7
Resale restrictions	1.2	1.6
Management effectiveness	1.5	2.5

* Average (mean) score, where 1 = very satisfied
2 = somewhat satisfied
3 = not satisfied

a = Parkvale Estates buyers
b = Parkvale Downs buyers

and "low maintenance." Many of their expectations were translated to development features because of their personal involvement in the project.

6.3.2 Interior of the Home

Expectations about interior home features averaged between "very important" and "important" for buyers. Parkvale Estates respondents had significantly higher expectations for storage (they have no basement), lever-type faucets, and bathroom safety bars, and were very satisfied with these features in their units.

Parkvale Estates buyers were significantly more satisfied than Parkvale Downs buyers with the following interior features:

- window type,
- good use of space,
- convenient kitchen,
- laundry area,
- lighting,
- electrical outlets, and
- flooring.

This higher level of satisfaction for the above features may be attributed in part to the resident involvement in the design and development process for Parkvale Estates. Buyers were also given the opportunity to make design and material changes during the construction phase.

6.3.3 Optional Features

Expectations for optional features were generally considered relatively unimportant to respondents, with the exceptions of an alarm system and wheelchair access for Parkvale Estates respondents and a fireplace for Parkvale Downs residents.

Although many of the listed optional features were unavailable in one project or the other, wheelchair access is better (and residents are more satisfied) in Parkvale Estates because of the on-grade nature of the project.

The emergency call and alarm systems were not common features offered in Parkvale Estates. Several residents apparently have added them and are very satisfied.

6.4 Satisfaction with Neighborhood Amenities

Expectations that the home be near recreational facilities and social services were rated as important. The average rating of satisfaction for these features fell between "very satisfied" and "somewhat satisfied." Although recreational facilities are within a few blocks of both projects, many residents felt there should be a small common building on-site. This is discussed in more detail in Section 9.

6.5 Satisfaction with Project Management

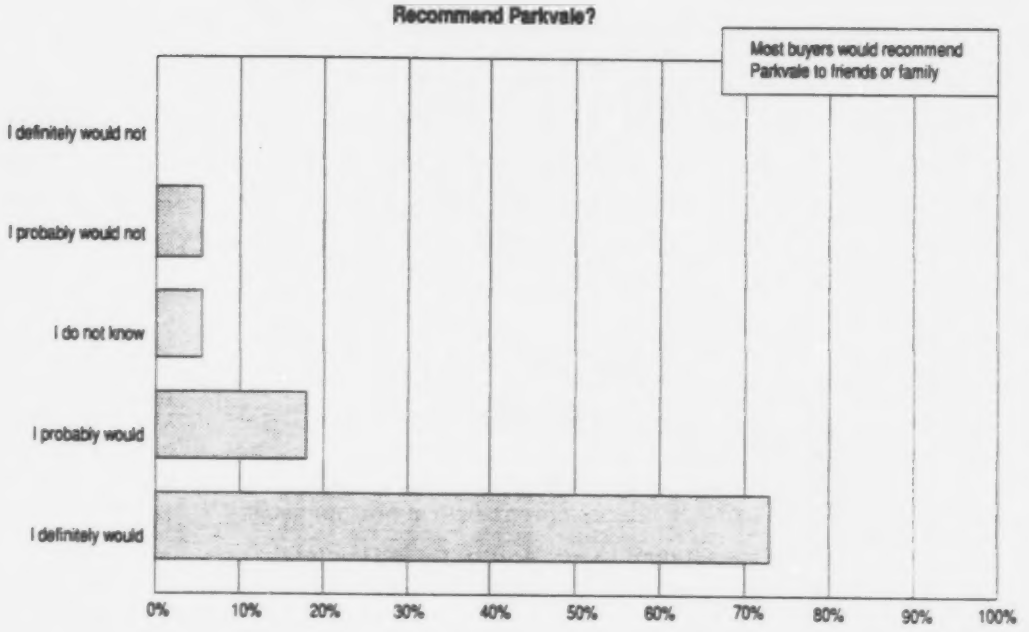
Expectations for project management were not measured since the issue would only relate to condominium living and both Parkvale Estates and Parkvale Downs are fee simple projects, not condominiums.

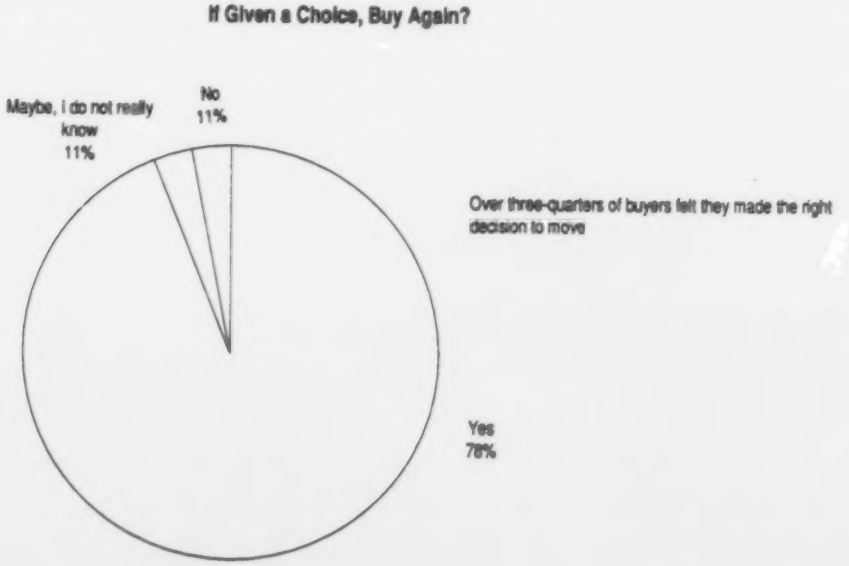
However, satisfaction with project management was questioned. Parkvale Estates has an owners' association; Parkvale Downs is now in the process of establishing one. Parkvale Estates respondents were generally "very satisfied" with project management issues. On the other hand, Parkvale Downs residents were only "somewhat satisfied" with the new owners' association, involvement opportunities, and management effectiveness. These issues may, however, be resolved with the maturing of the new owners' association.

6.6 Overall Satisfaction with Parkvale

When questioned whether owners would recommend a unit to friends, 82 percent of Parkvale Estates and 60 percent of Parkvale Downs buyers said "yes" (see Figure 6.1, page 71). In addition, if respondents had the option of making the choice over again, 86 percent of Parkvale Estates and 67 percent of Parkvale Downs respondents indicated they would. Reasons for not recommending a unit include:

FIGURE 6.1 OVERALL HOUSING SATISFACTION




If Given a Choice, Buy Again?
Maybe, I do not really know 11%
No 11%
Over three-quarters of buyers felt they made the right decision to move
Yes 78%

- no parking or wheelchair facilities (Parkvale Downs),
- high taxes (Parkvale Downs),
- not a luxury project (Parkvale Downs),
- less comfortable with cement floors (Parkvale Estates), and
- inadequate storage (Parkvale Estates).

In summary, housing expectations were generally met at Parkvale Estates and Parkvale Downs. The overall level of satisfaction regarding housing features (that is project design, unit design, amenities, and project management) was high. Significant differences between the level of satisfaction of Parkvale Estates and Parkvale Downs buyers occurred for only a few specific housing features. Parkvale Estates buyers were significantly more satisfied with the view, landscaping, no steps, low maintenance, window type, good use of space, few stairs, convenient kitchen, laundry area, lighting, electrical outlets, bathroom safety bars, and flooring.

On the other hand, although Parkvale Downs residents were not more significantly satisfied with the listed features, they were slightly happier with the nearby recreational facilities and open outdoor spaces.

Although residents were generally very satisfied with their project, respondents from Parkvale Downs were only "somewhat satisfied" with:

- project management—involvement opportunities and management effectiveness, and
- outdoor maintenance (which is optional).

Comparing the level of buyer satisfaction of Parkvale and Horizon Village buyers, Parkvale respondents were significantly more satisfied with distance to health services and shopping, landscaping, lighting, electrical outlets, flooring, wheelchair access, and fees. Horizon Village buyers were more satisfied with the covered entrance (it is not clear why since Parkvale Estates and Parkvale Downs have similar entrances to Horizon Village).

SECTION 7

MAINTENANCE OF SELF-SUFFICIENCY AND INDEPENDENCE

7.1 Lifestyle Changes

7.2 Desired Support Services

7.3 Final Move?

7.4 Issues Which Would Necessitate a Move

7.0 MAINTENANCE OF SELF-SUFFICIENCY AND INDEPENDENCE

Senior citizens wish to maintain their self-sufficiency and independence as long as possible. This desire is reflected by purchasers of Parkvale units who prefer single level living and pride of ownership. As discussed in previous chapters, housing needs change as a family ages, and alternative forms of housing may be considered to accommodate these changes. For example, as health declines, outdoor maintenance becomes a problem. Retirement housing has addressed some of the changing needs and expectations of older people.

To ascertain to what degree the retirement village concept can contribute to self-sufficiency and independence, Parkvale Estates and Parkvale Downs residents were surveyed through questions on health, lifestyle changes, expectations of a final move, desired support services, and issues which would necessitate a move from their Parkvale unit. This section summarizes the preliminary findings of the buyer survey related to the above-mentioned issues (health is also discussed in Section 4). Detailed data in response to survey questions may be found in Appendix A.

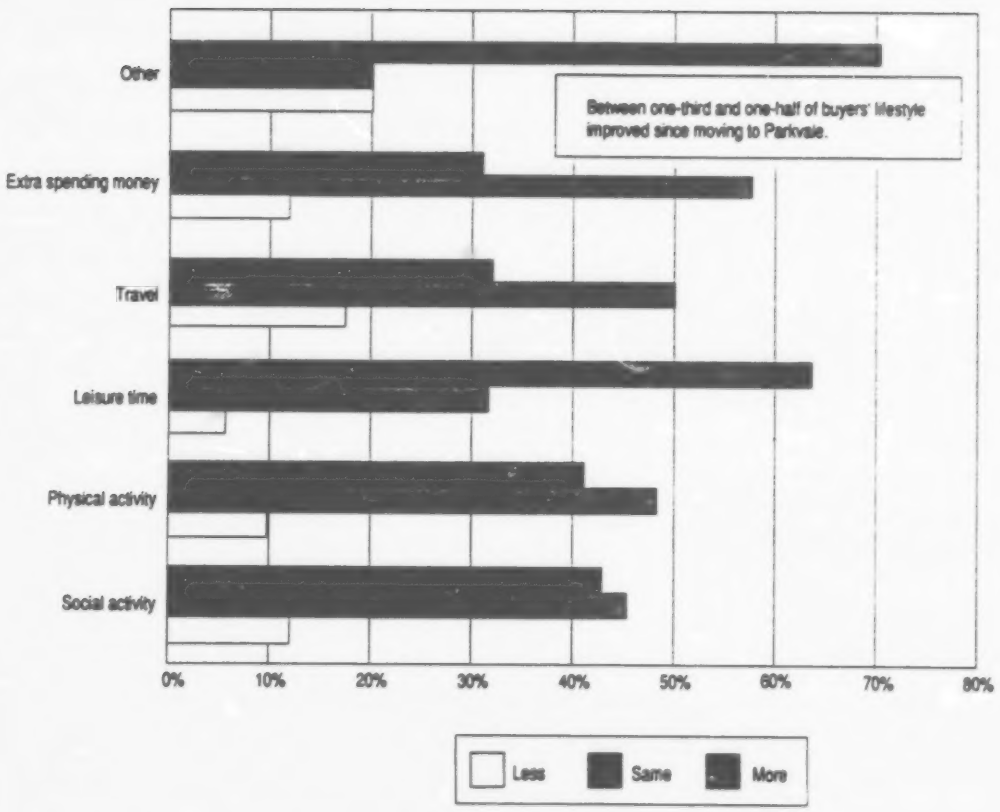
7.1 Lifestyle Changes

Housing relocation often involves lifestyle changes. Buyers were asked to rate their lifestyle in terms of the level of activity (that is less, same, more) for several key areas, now that they live in Parkvale Estates or Parkvale Downs. Social and physical activity increased for nearly half of the respondents (see Figure 7.1, page 75). Although leisure time increased for two out of three residents, only one-third now travel more, particularly Parkvale Estates residents.

Although many owners paid less for their Parkvale units than the value of their previous homes, the majority of respondents perceived that they still had the same amount of spending money.

Other lifestyle changes indicated by respondents included the following:

FIGURE 7.1 LIFESTYLE CHANGES AFTER MOVING TO PARKVALE



*May add up to more than 100% because of multiple responses

— "less work,"
— "see my family more," and
— "quieter surroundings."

7.2 Desired Support Services

Respondents were asked to indicate which support services they would like to have available to Parkvale residents. Figure 7.2 (page 77) gives frequencies of requests for the services mentioned. Nearly half (43%) of respondents indicated that they did not desire any of the listed services to be provided on-site but would rather arrange such services on their own when the need arose. The highest response for support services was for an emergency call button or system within their unit.

7.3 Final Move?

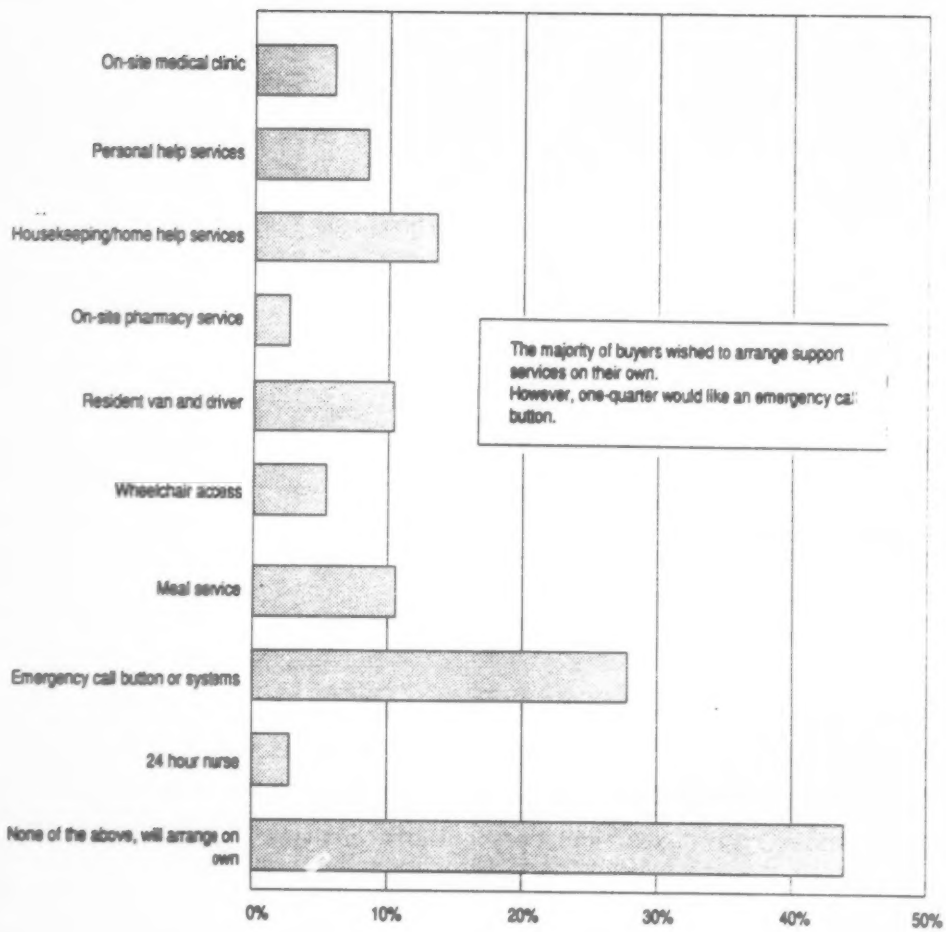
Respondents were questioned whether they felt that Parkvale would be their final move. Most (86%) of Parkvale Estates and two-thirds of Parkvale Downs buyers felt it would be their final home.

7.4 Issues Which Would Necessitate a Move

Respondents were questioned about issues which would necessitate a move from Parkvale. Most indicated that severe health problems would necessitate a move. Other reasons included financial issues, to remain close to family, to live in a milder climate, high taxes, and personal life changes such as a job transfer or divorce.

In summary, Parkvale respondents wished to maintain their self-sufficiency and independence as long as possible. Several residents mentioned their plan for extended independence. For example, several couples said they moved into a retirement village to ensure that the spouse left alone after one died would be living in housing which was suitable to a widowed lifestyle.

FIGURE 7.2 DESIRED SUPPORT SERVICES



• May add up to more than 100% because of multiple responses

Their lifestyle generally remained the same or improved since their move to Parkvale. The majority expect this to be their final move and wish to arrange support services on their own, as they are required, rather than have such services continuously available to the entire project. The only major issue which would necessitate a move would involve severe health problems.

SECTION 8

RETIREMENT VILLAGE IMPROVEMENTS

8.1 Project Design Improvements

8.2 Unit Design Improvements

8.3 Amenities Improvements

8.4 Management Improvements

8.5 Development Improvements

8.0 RETIREMENT VILLAGE IMPROVEMENTS

Buyers and non-buyers of Parkvale units were asked about changes they would make in another retirement village project if they were a builder or developer (see Appendix A). This section provides the suggested changes or improvements as indicated by buyers of Parkvale Estates, and buyers and non-buyers of Parkvale Downs. The suggestions are presented in the same format as information on expectations and level of satisfaction in Section 6: project design, unit design, amenities, and management.

Seventeen respondents from Parkvale Estates (two indicated they would not make any changes), twelve buyers of Parkvale Downs (one indicated he/she would not make any changes), and twelve non-buyers of Parkvale Downs gave suggestions for changes to other retirement housing projects. It should be noted that these suggestions or improvements are not evaluations as such but, rather, perceptions toward an ideal housing environment. Further, they are not necessarily made in the context of a realistic buying situation. Buyers must make trade-offs among housing features and may not wish to pay for all the suggested improvements. Although the suggestions are summarized for each project, it should be kept in mind that the sample size for this question was not large and therefore should not be viewed as representative of all occupants.

8.1 Project Design Improvements

Design improvements refer to location and lot features. No project design improvements relating to the location were suggested. The high level of satisfaction with locational features is also indicative of the ideal location of both Parkvale projects. One respondent of Parkvale Estates suggested the front yard be decreased in size and the back increased.

8.2 Unit Design Improvements

Unit design improvements are discussed in terms of exterior and interior of the home.

8.2.1 Exterior of the Home

Parkvale Estates residents expressed the following improvements:

- provide recreational vehicle storage;
- recess the utility meter at the front entrance, and
- enclose the patio (glass and screen) for security, privacy, and protection from the elements.

Parkvale Downs residents suggested:

- an attached garage,
- a double garage,
- underground parking to increase the size of the back yard,
- the opportunity to plan their own back yard,
- a better deck finish that will not peel,
- better land drainage,
- lane lighting,
- brighter unit colors, and
- privacy fencing without a closed-in feeling.

Non-buyers of Parkvale Downs suggested:

- recreational vehicle storage;
- freestanding units;
- a double garage;
- a small garden space; and
- a small, very private space in the back yard, perhaps a gazebo-type structure.

8.2.2 Interior of Home

Parkvale Estates residents suggested:

- increased storage and closet space,
- a crawl space or full basement to avoid concrete floors,
- a larger garage,
- more floor space (e.g. 2 ft. wider; 200 sq. ft.),
- better soundproofing,
- lever-type door handles,
- a hot water system in the garage instead of the house,
- forced air heating, and
- a larger utility room.

Parkvale Downs residents suggested:

- a larger living room,
- a living room design which easily accommodates furniture from their previous homes,
- a larger laundry room for ironing,
- a convenient kitchen layout,
- a window in the basement,
- good quality plumbing,
- better soundproofing,
- a larger hot water tank, and
- a side door for better air circulation.

Non-buyers suggested:

- larger units,
- varied sizes (up to three bedrooms),
- a larger kitchen with more cupboards,
- "slide-out" type lower kitchen cupboards for people with knee or back problems,
- a larger living room,
- a formal dining room,
- a larger master bedroom, and
- bungalow units for the entire project.

8.3 Amenities Improvements

Parkvale Estates and Parkvale Downs respondents suggested a small club house or social center for meetings or small gatherings for residents. Although there are several gathering places for seniors in the area, a more private setting was preferred at times.

8.4 Management Improvements

A Parkvale Estates resident indicated that management was difficult to communicate with and suggested that a larger board of directors may help to resolve this problem.

Parkvale Downs residents suggested:

- mandatory monthly maintenance for all owners,
- restrictions on car washing, and
- housesitting services.

Non-buyers suggested an on-going outdoor maintenance program on a "per use" basis at reasonable rates.

8.5 Development Improvements

Parkvale Downs residents suggested better supervision during construction, as well as a clear understanding of property rights with respect to the use of the outdoor common space between buildings. A non-buyer suggested a home trade-in program for those homeowners who have difficulty selling their houses.

In summary, the key improvements for future retirement projects are RV storage; a small club house or recreation center; more storage when there is no basement; better designed interior spaces; and a larger, attached garage. It should be noted that Parkvale Estates residents cited many of the improvements noted here in a survey of owners by their society. Horizon Village owners also suggested RV storage space.

SECTION 9

INTERVIEWS

9.1 Interviews with Selected Experts

9.2 Interviews with Parkvale Owners

9.0 INTERVIEWS

Interviews were held with two groups: various individuals associated with retirement housing in Red Deer and owners of Parkvale Estates and Parkvale Downs units. This section summarizes the interviews and relates the results to the mail questionnaire findings presented in previous sections.

9.1 Interviews with Selected Experts

9.1.1 Mr. Bill Mittelmeyer, President, Parkvale Estates Society

Mr. Mittelmeyer had long felt the need for affordable, well-designed housing for seniors in Alberta. Retired people should be able to sell their homes which no longer meet all their housing needs and profit from this sale. This "trading down" allows seniors to travel more, for example.

He felt that seniors wish to be involved with the planning and design of retirement housing. They have varying needs which must be accommodated. The self-help approach provides seniors the opportunity to be involved in the development of housing which accurately meets their needs and preferences. In his opinion, very few seniors (particularly homeowners) wish to move to an apartment when their homes become too difficult to manage.

Although Mr. Mittelmeyer would like to see additional self-help housing projects for seniors, he admits it takes a very dedicated and determined group—a group which also has some experience in development and construction.

Mr. Mittelmeyer gave the following suggestions for similar retirement projects:

- Many seniors wish smaller front yards but larger back ones. Building coverage and boundary by-laws need to be relaxed to allow for this.
- Offer several different floor plans and allow minor changes. "Custom building" 47 units was very difficult.

— By-laws need to be relaxed regarding storage sheds (they now must be three feet apart) and enclosed patios.

The key to improved retirement villages is the realization that this type of housing is different from existing multi-family dwellings. There needs to be flexibility within the community and city planning to allow for innovative housing for seniors.

9.1.2 Mr. Steve Scott, President, Avalon Homes

Since Avalon's first retirement project—Parkvale Downs—in 1984, the developer has learned (mainly through experience) much about the retirement housing market in Alberta. Changes to subsequent projects have reflected customer needs and preferences. These changes include:

— strictly bungalow-style units,
— attached garages,
— crawl-space basements,
— increased accessibility by handicapped persons (e.g. wider hallways and doorways, wheelchair showers), and
— features to aid seniors (e.g. bathroom grab bars, lever-type door handles and faucets, non-slip tubs).

To further accommodate varying needs and preferences of buyers, Avalon allows many minor design changes within the unit. As well, the company is agreeable to more extensive customization for clients willing to pay for it.

Mr. Scott explained that it was very difficult to initially market Parkvale Downs units—particularly without a show home. People want to see what they are buying, or at least see an example of a previous project by the developer. Avalon set a large advertising budget to market and pre-sell Parkvale units. Radio announcements and weekly newspaper ads supplemented the model home which was eventually built on-site.

9.1.3 Mrs. L. Phillips, Associate Chairperson, Parkvale Downs

Parkvale Downs is a fee simple development which does not require extensive by-laws such as the condominium by-laws of Horizon Village. Although the developer set basic by-laws governing the project, owners are very free to pursue an independent lifestyle. Outdoor maintenance, for example, is optional.

However, minor problems such as common area snow removal (in the lane area) were arising. Owners did agree to pay a $25 monthly fee for lane snow removal. Many owners, though, voiced the need for an owners' association to deal with common issues and to arrange social activities. A nine or ten member association is due to begin meeting in the spring (of 1988).

9.1.4 Mr. Vernon Parker, Associate Planner, Regional Planning Commission, City of Red Deer

Parkvale was originally designed for higher density development. Because there was little demand for this type of housing in 1983, the city agreed to seniors' housing projects. The location of Parkvale Estates and Parkvale Downs is ideal. Further, local neighborhood residents (a high concentration of seniors) were very supportive of the concept.

There were a few hurdles to overcome because of the nature of the retirement village developments. Parkvale Downs was a difficult site to develop townhouses rather than multi-family dwellings. Parkvale Estates had difficulties which included a gas line easement, enclosed patios, and storage sheds. Limiting the project to 55 and over was a different type of difficulty.

The city is now addressing issues such as recreational vehicle parking and the future of retirement housing developments. There is a recognition of the growing market for seniors' housing. Changing demographics will require the incorporation of new information into, as well as changes in, the planning process.

9.2 Interviews with Parkvale Owners

Owners of Parkvale units who completed the questionnaire were also asked to identify themselves if they wished to participate in an in-depth personal interview about retirement housing. Fifteen owners were interviewed--eight in Parkvale Estates and seven in Parkvale Downs. Two-thirds were married, one-third widowed. Owners were very cooperative and sincere in their responses to interview questions.

Interviews ranged from one to one and one-half hours and covered the following topics:

- location of previous residence,
- proximity of services,
- benefits and disadvantages of living in a retirement village,
- overall satisfaction with Parkvale,
- anticipated future problems, and
- an ideal retirement village.

9.2.1 Where Did They Live Before Parkvale?

Approximately three out of four survey respondents were from Red Deer. Others moved to Red Deer primarily to be near family and friends and for health reasons.

About half of the interview respondents were also from Red Deer. Two moved from British Columbia to be near family and friends, one couple moved from a small nearby town to work in Red Deer, and one couple from Edmonton wanted an affordable retirement village.

9.2.2 What Types of Housing Alternatives Were Considered?

Several owners did not consider anything other than Parkvale Estates or Parkvale Downs because no other options suitable to their needs and preferences were available. Most owners did not want to live in another house, a high-rise condominium, or apartment. A Parkvale unit reflected their changing housing needs

and maintained their level of independence. Fee simple ownership was highly regarded and reflects freedom, control, and independence.

9.2.3 Proximity to Services

Although the bus stop is about a block away, shopping, services, and recreational facilities are within .5 to 1.5 km or within walking distance--a maximum of six or seven blocks.

A Safeway store is about four blocks away, downtown shopping and services are within six blocks, the hospital and nursing homes are one km away, curling and arena are one block distant, and the Golden Circle Seniors' Centre, Pioneer Lodge, Rotary Picnic Park, and Museum are within two blocks.

The only service lacking is a near-by convenience store.

A new provincial lodge is under construction and is located between, and directly adjacent to, Parkvale Estates and Parkvale Downs.

9.2.4 What are the Benefits of Living in Parkvale?

Owners were very happy with the retirement village concept. The following list summarizes owner-perceived benefits of living in Parkvale Estates or Parkvale Downs:

- atmosphere of caring, helping, and concern;
- friendly place to live;
- easy to keep, low maintenance;
- convenient location with very good access to facilities and services;
- similar age group;
- quiet;
- secure and safe;
- allows for more freedom (e.g. to travel);
- lower costs;
- privacy;

- no stairs (Parkvale Estates);
- companionship; and
- owner control over the project.

The above perceived benefits generally reflect buyers' reasons for purchasing units in Parkvale.

9.2.5 Disadvantages to Living in Parkvale

The perceived disadvantages to living in their retirement villages were relatively few and several people were hard-pressed to think of any. The disadvantages mentioned included:

- inadequate space for recreational vehicles,
- concrete floors too hard on the legs,
- no small recreation center on-site (for meetings and small social gatherings),
- small back yard (Parkvale Downs),
- detached garage (Parkvale Downs),
- high taxes (Parkvale Downs),
- small living room (Parkvale Downs),
- second floor washer and dryer (Parkvale Downs),
- uncertainty of future exterior changes,
- resale value (Parkvale Downs), and
- small utility room (Parkvale Estates).

Many owners indicated that they have learned to live with the minor problems and are satisfied on the whole.

9.2.6 Unmet Housing Needs

Many owners felt their housing needs were fully met by moving to Parkvale. The few owners who did have unmet needs cited:

- the need for a larger garage for storage (Parkvale Estates), and
- the need for a front drive, attached garage (Parkvale Downs).

9.2.7 Satisfaction with the Project Location

Owners were very pleased with the "ideal" location of their project, particularly Parkvale Estates, and enjoyed its quietness and convenience. Parkvale Estates residents were pleased with the country-like setting, although a few owners adjacent to the park worry about security. However, the walking trails are used by many residents of both projects.

The survey results also reflected respondent satisfaction with the project location.

9.2.8 Satisfaction with the Project Design

On the average, owners were satisfied with the project design.

Parkvale Estates residents were pleased with the "standard" street and sidewalk system through the project. Owners did not feel as though they were living in row housing. Several owners did, however, express the wish that they had a larger back yard and smaller front one.

Several Parkvale Downs residents felt that their back yard was "claustrophobic" because of the detached garage. On the other hand, a few residents preferred a detached garage because it avoided "the smell of oil and gas seeping into the home." Parkvale Downs residents generally did not criticize any "row house" design but did mention that combining nine units was too extreme.

Both Parkvale Estates and Parkvale Downs residents expressed the desire for RV parking and a small recreation center for meetings and social gatherings. It is interesting to note that this was not an issue of importance when either project was pre-selling. Further, the Parkvale Estates Society recently voted on the addition of a small building (or conversion of one unit)—the motion was narrowly defeated.

9.2.9 Satisfaction with the Unit Design

Owners of both projects, particularly Parkvale Estates because of owner options and involvement, were on average very pleased with the unit design. Owners living in bungalow units particularly felt this design was ideal for older people.

Suggested unit design changes included:

- a design to avoid the "long, narrow" appearance of the living areas;
- a kitchen window (Parkvale Estates);
- an enclosed sunporch/patio (Parkvale Estates); and
- a larger living area (Parkvale Downs).

A variety of floorplans and design changes did, however, increase the potential satisfaction of residents.

9.2.10 Quality of Construction and Price

Parkvale Downs and Parkvale Estates respondents perceived the quality of construction, materials, and workmanship to be very good.

Because of the self-help approach, Parkvale Estates was considered to be an excellent price. Owners of Parkvale Downs units felt the price was fair and competitive with other available housing options. (Prices are provided in Section 2.)

9.2.11 Overall Satisfaction

On the whole, owners were very satisfied with the concept of ownership retirement villages. On a scale of one to ten (10 = best), overall satisfaction with Parkvale Downs ranged from seven to ten and averaged eight out of ten. Parkvale Estates ranged from eight to ten and averaged nine out of ten.

Owners preferred the fee simple approach which allowed for more freedom (several planted a small garden), control, and independence.

9.2.12 Special Design Features for Seniors

Parkvale Estates residents were more concerned about special design features for seniors—the average age is higher than in Parkvale Downs. During the design process, Parkvale Estates owners learned about special features and design aspects as they progressed. Owners realized this was their final move and were realistic about aging problems. Units are built on-grade with optional features such as grab bars and lever-type faucets. Features to ease aging-in-place were also optional in Parkvale Downs—if requested.

During the interviews, buyers were asked if they would have been offended by such optional design features as safety grab bars, lever-type faucets and door handles, wheelchair access, and emergency call buttons. Older individuals (that is over 60) indicated that they would (and many did) consider these features, and realistically thought they may eventually require them. However, respondents felt special features to accommodate changing needs would need to be subtly incorporated into the home design to avoid an "old folks home" appearance. Younger residents (under 55) in Parkvale Downs indicated they would "worry about them when the time comes."

9.2.13 Future Problems

Parkvale Estates residents did not foresee any future problems with their project. It is designed to live in as long as their health is not a major problem.

Parkvale Downs residents perceived the following potential problems:

- wheelchair access in a 2-story unit (otherwise the doorways and halls are wide enough),
- changing by-laws,
- selling restrictions,
- adequate maintenance fund,
- maintaining a continuity in exterior appearance (fee simple ownership is less restrictive), and
- further changes in housing needs may require a move (e.g. stairs).

9.2.14 An Ideal Retirement Village

Many owners felt that their project was an ideal form of retirement housing. Others suggested the following major additional features which would make Parkvale an "ideal retirement housing situation":

- recreational vehicle parking,
- an attached garage,
- increased storage (Parkvale Estates), and
- a small recreation center.

In addition, other features of an ideal village would include:

- no basement,
- located adjacent to a golf course,
- bungalow units with no stairs,
- a medium-sized project, and
- all outdoor maintenance provided.

In summary, residents of Parkvale Estates and Parkvale Downs are very satisfied with the retirement village housing concept.

SECTION 10

CONCLUSIONS AND RECOMMENDATIONS

10.1 Major Conclusions

10.2 Recommendations for Private Industry

10.3 Recommendations for Future Research

10.0 CONCLUSIONS AND RECOMMENDATIONS

This study evaluated two Red Deer retirement housing projects—Parkvale Estates (a seniors' self-help approach) and Parkvale Downs (a private industry development). Its purpose was to prepare a report which designers, developers, and prospective owners may utilize to assist in their decisions regarding the design, building, purchase, or operation of owner-occupied retirement housing.

This study focused on five major objectives which were important to the concept of ownership retirement housing in Alberta. Major conclusions of this study are discussed below in terms of these five objectives.

10.1 Major Conclusions

10.1.1 Needs, Expectations, and Preferences of the Mature Market

Buyers and non-buyers of Parkvale units were similar in terms of their demographic and socioeconomic characteristics, as well as their housing situations. However, several significant differences were found:

- Parkvale Estates buyers lived in their previous homes for a longer period of time.
- Parkvale Estates buyers tended to be mortgage-free; a number of Parkvale Downs buyers and non-buyers still carry mortgages.
- Parkvale Estates buyers paid less for their units than for their previous homes because of the self-help approach and because many "moved down."
- On average, Parkvale Estates residents were older, more likely to be widowed, retired, had lower incomes, and tended to travel more than their Parkvale Downs counterparts.

Housing needs change as families age. Buyers and non-buyers expressed outdoor maintenance as a primary reason for moving. This feature reflected the health problems of many buyers, as well as the desire for freedom to travel. Both groups

had very similar expectations about the home which would meet their changing needs. Approximately half the respondents had seriously considered remaining in their own homes. Moreover, until recently, there were no suitable housing alternatives in Red Deer for this audience. The retirement village concept provided many buyers with an attractive alternative. In fact, many buyers were not actively locking for a housing alternative until they discovered Parkvale Estates or Parkvale Downs.

In summary, respondents preferred to be homeowners, to live in a single level unit which ranged in size from 87 square meters (930 square feet) to 118 square meters (1270 square feet), to live with a mature age group (no children), and to feel physically and financially secure with their housing.

10.1.2 Were Housing Expectations Met by the Parkvale Projects?

Buyers indicated that most of their housing expectations were met by moving to Parkvale. Residents enjoy the maintenance-free exteriors, a mature adult community, and worry less about security and travel. Although some features were more important to Parkvale Estates buyers, both groups had similar expectations about the home which would meet their changing needs. Unlike Horizon Village buyers in Edmonton, many Parkvale buyers purchased units smaller than their previous homes. Many non-buyers liked the housing concept but were not yet ready to move.

In summary, buyers moved to Parkvale because of the convenient and "ideal" location, a mature adult community, low outdoor maintenance, worry-free travel, and affordability (particularly the affordability of Parkvale Estates).

10.1.3 Level of Housing Satisfaction

Respondents were very happy with the concept of ownership retirement housing as a housing alternative for seniors. Buyers' overall satisfaction with Parkvale Estates or Parkvale Downs was very positive. More specifically, there were some significant differences between the level of satisfaction between the two projects. Parkvale Estates residents were more satisfied with the view, landscap-

ing, on-grade elevation (no steps), type of windows, and several aspects of the interior.

Residents from Parkvale Downs expressed concern about project management and outdoor maintenance. They are currently organizing an owners' association to deal with project issues.

Most residents would recommend their project to family or friends, and most would make the same buying decision over again.

Comparing the level of satisfaction of Parkvale and Horizon Village buyers, Parkvale residents were significantly more satisfied with distance to health services and shopping, landscaping, interior lighting, electrical outlets, flooring, wheelchair access, and fees.

10.1.4 Improvements to the Concept

The following key improvements for future retirement projects were suggested:

- recreational vehicle storage,
- a small club house or recreation center for meetings and small gatherings,
- more storage if there is no basement,
- well-designed interior spaces, and
- a larger attached garage.

10.1.5 Self-Sufficiency and Independence

Parkvale residents wish to maintain their self-sufficiency and independence as long as possible. Their lifestyles generally have remained the same or improved somewhat since the move to Parkvale Estates or Parkvale Downs. Most owners also felt this would be their last move, unless severe health problems dictated another move. Although most residents do not plan to move again, many wish to arrange support services on their own rather than have such services on-site.

It is interesting to note that although the move to Parkvale Downs is considered a final move for the majority of the residents, very few thought about specialized design features to accommodate aging. However, when questioned about their reaction to specialized designs for seniors, older individuals overwhelmingly indicated a positive response. Younger residents expressed the tendency to "worry about it when the time comes."

Because of the self-help approach (and because they were older), Parkvale Estates residents were more concerned with, and researched, features which would make aging-in-place possible. If marketed properly, however, many indicated they would be realistic about aging and would have considered such features in their purchase decision.

10.2 Recommendations for Private Industry

The mature market segment of the Canadian population (55 years and over), currently 14 percent, will reach 20 percent of the total population by the end of the century. Although it is the fastest growing market segment, the private housing industry has only recently realized this market potential. There will be many exciting opportunities to develop housing for this segment. However, the mature market is not a homogeneous group. The various sub-groups have different needs, expectations, and preferences in housing. As well, the majority of seniors are very reluctant to move—perhaps because until recently, the best choice has been to remain in their single family homes as long as possible. However, this is not always the optimal solution. Ownership retirement housing is a well-received alternative for many seniors in Alberta.

Because the mature market will represent a stable and significant market force in the near future, the challenge for private industry lies in providing suitable and desirable options for seniors—options which will accommodate aging-in-place. Although seniors experience changing housing needs, most do not have an urgent need to move. Therefore, unless they are offered a better housing alternative, seniors will remain in their present homes.

Further, some senior consumers will also be demanding more participation in the planning process. They wish to play a role in developing housing alternatives which accurately meet their needs, lifestyles, and preferences. As witnessed in Parkvale Estates, seniors who had the opportunity to voice their opinions and wishes are significantly more satisfied with the final product. However, because of the time and dedication required with the self-help approach, particularly by key individuals like Bill Mittelmeyer in the Parkvale Estates project, few groups have taken this route even though it can result in substantial savings in cost. Learning from the self-help approach, private industry should realize that involvement opportunities for seniors may be effective in their sector as well. Seniors are the "experts" and appreciate a "voice." They are the ones who can and will tell developers what will meet their needs and desires.

Marketing retirement housing to the mature market requires much handholding. Buyers want to be sure they are receiving security and value for their investment. Satisfied buyers will also be the developers' best salespeople (or worst if they are not satisfied).

In summary, market research will become increasingly important as competition within the industry grows. A developer should not assume that a project successful in the United States, or even other areas of Alberta or Canada, can be successfully "transplanted" to another location. By undertaking thorough and professional market research to determine who to serve and what to offer—and to "test market" a concept—developers can successfully sell a retirement housing project which accurately reflects a certain segment of the mature market. Developers should consider such housing expectations as convenient location, maintenance-free living, a nice view and landscaping, security, privacy, affordable single level units with attached garages, adequate storage, recreational vehicle parking, recreation building, and optional design features including design and materials changes and features to assist aging-in-place.

Increasingly, seniors are conscientious buyers who have plenty of free time to shop around.

10.3 Recommendations for Future Research

Traditionally, retirement housing market research has focused on the needs and preferences of potential residents. Another important source of information comes from the actual residents of retirement housing projects.

Parkvale Estates and Parkvale Downs have proven to be a viable alternative for seniors. However, increased knowledge (particularly long-term impacts) about retirement housing would permit a more sensitive response to demand, both for private industry and government programs.

Beyond the project-specific research on retirement housing, there is also a need to learn more about the nature, characteristics, and differences among the various segments that make up the mature market. The number of housing options will increase as this market continues to grow. New alternatives will need to be researched, market tested, and evaluated. There will be an increasing need to develop housing choices which accurately reflect the target market.

APPENDIX A

MAIL QUESTIONNAIRES AND
SURVEY RESULTS

n = respondents
n = 37

RESIDENTIAL SURVEY

SUMMARY OF PARKVALE RESULTS *

YOUR DECISION TO MOVE

The questions in this section are about your **THINKING BEFORE YOU BOUGHT** in Parkvale Estates.

1 a). Please check **[✓] ALL** the **REASONS** for **YOUR MOVE** from your **PREVIOUS HOME.**

n=37

%		
0	1.	Previous home too small
32.4	2.	Previous home too large
70.3	3.	Too much outdoor maintenance
16.2	4.	Home needed major repairs
2.7	5.	Neighborhood unsafe
32.4	6.	Too many stairs
35.1	7.	No main floor laundry facilities
32.4	8.	Not close to community services (shopping, health care, etc.)
10.8	9.	Not close to public transportation
18.9	10.	Home difficult to look after
0	11.	Financial reasons
2.7	12.	Home too costly
13.5	13.	Death of spouse
10.8	14.	Loneliness
24.3	15.	Health reasons
8.1	16.	Need for more privacy
43.2	17.	Wish to be with mature age group
35.1	18.	Family encouraged the move
21.6	19.	To be near family/friends
37.8	20.	Other (please specify: _____)

* Although this survey refers to "Parkvale Estates" it is in fact a summary of both projects.

For "other" categories see Estates + Downs Summaries

1 b). From the **ABOVE** list, which were the **MOST IMPORTANT REASONS** for moving? (please use the number listed in front of the reason)

- # 3 was the most important reason
- # 17 was the 2nd most important reason
- # 18 was the 3rd most important reason
- tie # 2, 6 was the 4th most important reason
- # ____ was the 5th most important reason

using multiple response analysis

2. Which of the following **TYPES OF HOUSING** did you seriously **CONSIDER** before moving ? (check **[✓]** all that apply) [**Note**: apartments and condominiums are **non-subsidized**]

n=37

%		
48.6	☐	To remain where you were
29.7	☐	A house
5.4	☐	A high rise apartment
2.7	☐	A high rise apartment for seniors
10.8	☐	A low rise apartment
27.0	☐	A low rise apartment for seniors
2.7	☐	A high rise condominium
10.8	☐	A high rise condominium for seniors
0	☐	A nursing home
2.7	☐	A lodge
8.1	☐	Shared housing (among own age group)
0	☐	Live in children's home

3. How did you **FIRST HEAR ABOUT PARKVALE ESTATES?** (check one)

n=34

%	
5.9	☐ Television
0	☐ Radio
32.4	☐ Advertisement in a newspaper
0	☐ Advertisement in a magazine
47.1	☐ Family or friends
5.9	☐ Drove by and saw the sales office
2.9	☐ Parkvale Estates information centre
5.9	☐ Other (please specify: _____)

4 a). When you were **THINKING** about buying a **PARKVALE ESTATE** unit, **HOW IMPORTANT** were EACH of the following factors? (check [✓] one box for each item)

MEAN	STANDARD DEVIATION			min., max = x	1= Very Important	2= Important	3= Unimportant	4=Very Unimportant	Do Not Know
1.6	0.6	1.	Initial cost	(n)	☒=16	☐=16	☒=3	☐	☐=
1.9	0.6	2.	On-going cost/monthly costs		☒=8	☐=17	☒=4	☐	☐=
2.6	0.9	3.	Close to current neighborhood		☒=4	☐=7	☐=11	☒=4	☐=
2.3	0.9	4.	Close to family/friends		☒=6	☐=9	☐=10	☒=2	☐=
2.3	1.0	5.	Close to public transportation		☒=7	☐=13	☐=7	☒=4	☐=
2.2	0.9	6.	Social activities		☒=7	☐=14	☐=9	☒=2	☐=
2.1	0.7	7.	Recreational activities		☒=6	☐=24	☐=4	☒=2	☐=0
1.9	0.8	8.	Restricted to age 50 and over		☒=11	☐=18	☐=3	☒=2	☐=0
1.4	0.5	9.	Safety/security features		☒=19	☒=15	☐=0	☐=0	☐=0
1.7	0.6	10.	Design of individual unit		☒=13	☐=19	☒=2	☐=0	☐=0
1.9	0.6	11.	Parking		☒=7	☐=18	☒=4	☐=0	☐=
1.8	0.6	12.	Appearance of the buildings		☒=10	☐=20	☒=2	☐=0	☐=0
1.7	0.9	13.	Maintenance free exteriors (snow removal, grass cutting, etc.)		☒=17	☐=12	☐=2	☒=2	☐=2
1.9	0.7	14.	Close to health services		☒=9	☐=18	☐=4	☒=1	☐=0
1.9	0.7	15.	Close to shopping		☒=8	☐=21	☐=4	☐=1	☐=0
1.8	1.0	16.	Opportunity for ownership		☒=15	☐=9	☐=4	☒=3	☐=0
2.0	1.0	17.	Purchasing in a new complex		☒=10	☐=11	☐=3	☒=3	☐=0
1.8	0.8	18.	Resale value		☒=11	☐=18	☐=1	☒=2	☐=0
2.0	1.0	19.	No children allowed		☒=11	☐=10	☐=6	☒=3	☐=0
1.6	0.6	20.	Quality of construction		☒=15	☐=17	☒=1	☐=0	☐=0

4 b). From the **ABOVE** list, which were the **5 MOST IMPORTANT FACTORS?** (please use the number listed in front of the reason)

tie

- # 1 was the most important reason
- # 9 was the 2nd most important reason
- # 13 was the 3rd most important reason
- # 8, 20 was the 4th most important reason
- # ____ was the 5th most important reason

using multiple response analysis

5. When you were **LOOKING** for a new home **HOW IMPORTANT** were the following **HOME FEATURES** to you? (please check [✓] a box for **EACH** feature)

MEAN	STANDARD DEVIATION	min, max = x (n)		1= Very Important	2= Important	3= Unimportant	4=Very Unimportant
		LOCATION					
2.3	0.9	Distance to transit stop		☒=6	☐=14	☐=9	☒=3
2.6	0.7	Distance to place of worship		☐=0	☒=15	☐=12	☒=3
2.0	0.8	Distance to health services		☒=8	☐=17	☐=7	☒=1
2.0	0.7	Distance to shopping/services		☒=8	☐=20	☐=5	☒=1
2.3	0.8	Distance to family/friends		☒=6	☐=13	☐=12	☒=1
2.3	0.9	Distance to parks/lake		☒=5	☐=14	☐=8	☒=3
1.5	0.6	Quiet neighborhood		☒=18	☐=17	☒=1	☐=0
		LOT					
1.6	0.6	Privacy		☒=14	☐=16	☒=2	☐=0
1.8	0.6	Size		☒=10	☐=21	☒=2	☐=0
1.7	0.7	View		☒=13	☐=16	☒=4	☐=0
1.6	0.5	Landscaping		☒=13	☐=20	☒=1	☐=0
1.7	0.6	Direction facing (for sun)		☒=13	☐=18	☒=3	☐=0
		EXTERIOR OF HOME					
1.7	0.5	Patio area		☒=10	☐=23	☒=1	☐=0
1.7	0.9	Attached garage		☒=17	☐=9	☐=5	☒=1
1.7	0.5	Parking		☒=9	☐=19	☒=1	☐=0
1.8	0.9	No steps		☒=16	☐=11	☐=7	☒=1
1.7	0.8	Low maintenance (snow removal, etc.)		☒=15	☐=17	☐=1	☒=2
2.3	0.7	Covered entrance		☒=2	☐=17	☐=7	☒=1
1.8	0.6	Type of windows		☒=9	☐=23	☒=3	☐=0
		INTERIOR OF HOME					
1.4	0.5	Efficient floor plan		☒=22	☒=13	☐=0	☐=0
1.4	0.5	Good use of space		☒=21	☒=15	☐=0	☐=0
2.8	1.2	Full basement		☒=5	☐=6	☐=5	☒=11
1.6	0.9	Single level (bungalow)		☒=16	☐=7	☐=4	☒=1
2.7	1.0	Sun room		☒=3	☐=5	☐=9	☒=5
2.0	1.0	Few stairs		☒=11	☐=7	☐=6	☒=2
1.5	0.5	Convenient kitchen		☒=17	☒=19	☐=0	☐=0
1.5	0.5	Kitchen cupboards		☒=18	☒=17	☐=0	☐=0
1.5	0.5	Laundry area		☒=17	☒=18	☐=0	☐=0
1.7	0.5	Storage		☒=12	☐=21	☒=1	☐=0
1.5	0.5	Lighting		☒=16	☒=18	☐=0	☐=0
1.5	0.6	Electrical outlet convenience		☒=17	☐=16	☒=1	☐=0
2.6	0.8	Lever-type door handles		☒=3	☐=5	☐=15	☒=2
2.3	0.8	Lever-type faucets		☒=4	☐=12	☐=12	☒=1
2.2	0.9	Bathroom safety bars		☒=9	☐=11	☐=10	☒=2
1.6	0.6	Flooring		☒=14	☐=18	☒=2	☐=0

MEAN	STANDARD DEVIATION		1 = Very Important	2 = Important	3 = Unimportant	4 = Very Unimportant
		OPTIONAL FEATURES				
2.8	0.8	Fireplace	☒ = 2	☐ = 7	☐ = 15	☒ = 6
3.3	0.7	Whirlpool	☒ = 1	☐ = 1	☐ = 18	☒ = 11
3.1	0.6	Air conditioning	☒ = 1	☐ = 2	☐ = 21	☒ = 6
3.1	0.6	Emergency call button	☐ = 0	☒ = 3	☐ = 17	☒ = 5
2.3	0.9	Alarm system	☒ = 8	☐ = 8	☐ = 12	☒ = 2
2.8	0.8	Wheelchair access	☒ = 2	☐ = 8	☐ = 14	☒ = 5
		AMENITIES				
1.9	0.7	Near recreation facilities	☒ = 8	☐ = 21	☐ = 3	☒ = 1
1.9	0.7	Near social activities	☒ = 8	☐ = 19	☐ = 3	☒ = 1

6. When **CONSIDERING** the purchase of a **PARKVALE ESTATE UNIT**, who had the **MOST INFLUENCE** on the buying decision? (check [✓] one)

n = 35

%	
82.9	☐ No one, I/we made the decision alone
2.9	☐ Brother or sister
14.3	☐ Adult child
0	☐ Parent
0	☐ Other relative
0	☐ Friend
0	☐ Salesperson
0	☐ Other (please specify: _____)

7. How long did you **LOOK** for a new home?

n = 31

%	
51.6	☐ 1 - 4 weeks
16.1	☐ 1 - 5 months
9.7	☐ 6 - 12 months
6.5	☐ 1 - 2 years
12.9	☐ 2 - 3 years
3.2	☐ more than 3 years

YOUR CHOICE - PARKVALE ESTATES

The questions in the following section are about **YOUR DECISION TO BUY** in Parkvale.

8 a). Please check [✓] ALL your REASONS for BUYING a **PARKVALE** unit.

%		
86.5	1.	Mature adult community (age 50 and over)
40.5	2.	Companionship
59.5	3.	Worry-free travel
48.6	4.	Community spirit
75.7	5.	Independence maintained
24.3	6.	Gained money from previous home sale
54.1	7.	With similar people
64.9	8.	Suitable lifestyle
5.4	9.	Force by family to purchase
51.4	10.	More leisure time
40.5	11.	Living costs reduced
70.3	12.	Affordable
64.9	13.	Pride of ownership
78.4	14.	Good resale value
62.2	15.	Safety/physical security
83.8	16.	Attractive complex
51.4	17.	Nothing else like Parkvale was available
67.6	18.	A new place
94.6	19.	Convenient location
62.2	20.	No outdoor maintenance
N/A	21.	Recreation building
21.6	22.	Social activities
13.5	23.	Country atmosphere
51.4	24.	Several floor plans/options available
28.4	25.	Good size
94.6	26.	Easy to housekeep
54.1	27.	Special design features for seniors
48.6	28.	No children
10.8	29.	Recreational vehicle storage
2.7	30.	Other (please specify: _____)

n=37

8 b) From the **ABOVE** list, which were the 5 **MOST IMPORTANT REASONS** for BUYING a **PARKVALE ESTATES UNIT?** (please use the number listed in front of the reason)

tie
- # 19 was the most important reason
- # 1,20 was the 2nd most important reason
- # ____ was the 3rd most important reason
- # 3 was the 4th most important reason
- # 12 was the 5th most important reason

using multiple response analysis

YOUR LEVEL OF SATISFACTION

9. Please indicate your **SATISFACTION** with the following aspects of **PARKVALE.** (check [✓] a box for EACH aspect)

MEAN	STANDARD DEVIATION	min., max. = X LOCATION		1 = Very Satisfied	2 = Somewhat Satisfied	3 = Not Satisfied	Was Not Offered
1.7	0.7	Distance to transit stop		☒ = 15	☐ = 15	☒ = 5	☐ = 0
1.5	0.6	Distance to place of worship		☒ = 18	☐ = 14	☒ = 1	☐ = 1
1.1	0.3	Distance to health services	(n)	☒ = 30	☒ = 4	☐ = 0	☐ = 0
1.1	0.4	Distance to shopping/services		☒ = 31	☒ = 5	☐ = 0	☐ = 0
1.2	0.4	Distance to family/friends		☒ = 24	☒ = 7	☐ = 0	☐ = 0
1.1	0.4	Distance to parks/lake		☒ = 28	☐ = 2	☒ = 1	☐ = 0
1.1	0.3	Quiet neighborhood		☒ = 32	☒ = 3	☐ = 0	☐ = 0

MEAN	STANDARD DEVIATION	LOI	1= Very Satisfied	2= Somewhat Satisfied	3= Not Satisfied	Was Not Offered
1.4	0.5	Privacy	☒=23	☐=11	☒=1	☐=0
1.3	0.6	Size	☒=27	☐=6	☒=3	☐=0
1.4	0.6	View	☒=21	☐=14	☒=1	☐=0
1.3	0.6	Landscaping (n)	☒=27	☐=8	☒=2	☐=0
1.2	0.5	Direction facing (for sun)	☒=30	☐=4	☒=2	☐=0
		EXTERIOR OF HOME				
1.4	0.7	Patio area	☒=25	☐=6	☒=5	☐=0
1.3	0.6	Attached garage	☒=22	☐=4	☒=2	☐=5
1.7	0.7	Parking	☒=12	☐=11	☒=4	☐=2
1.3	0.6	No steps	☒=23	☐=5	☒=2	☐=2
1.6	0.8	Maintenance (snow removal, etc.)	☒=18	☐=7	☒=6	☐=3
1.9	0.7	Covered entrance	☒=5	☐=8	☒=3	☐=10
1.4	0.6	Type of windows	☒=22	☐=12	☒=2	☐=0
		INTERIOR OF HOME				
1.3	0.4	Efficient floor plan	☒=27	☒=9	☐=0	☐=0
1.3	0.5	Good use of space	☒=27	☐=8	☒=1	☐=0
1.3	0.5	Full basement	☒=10	☒=4	☐=0	☐=13
1.2	0.5	Single level (bungalow)	☒=22	☐=2	☒=1	☐=1
2.0	0.9	Sun room	☒=3	☐=2	☒=3	☐=13
1.3	0.6	Few stairs	☒=17	☐=3	☒=2	☐=1
1.1	0.3	Convenient kitchen	☒=32	☒=4	☐=0	☐=0
1.2	0.5	Kitchen cupboards	☒=31	☐=5	☒=1	☐=0
1.3	0.6	Laundry area	☒=26	☐=8	☒=2	☐=0
1.6	0.7	Storage	☒=17	☐=14	☒=3	☐=0
1.3	0.6	Lighting	☒=27	☐=5	☒=3	☐=0
1.2	0.4	Electrical outlet convenience	☒=28	☒=6	☐=0	☐=0
1.5	0.8	Lever-type door handles	☒=4	☐=1	☒=1	☐=15
1.2	0.4	Lever-type faucets	☒=11	☒=2	☐=9	☐=15
1.2	0.4	Bathroom safety bars	☒=16	☒=5	☐=0	☐=9
1.4	0.7	Flooring	☒=25	☐=7	☒=4	☐=0
		OPTIONAL FEATURES				
1.5	0.5	Fireplace	☒=6	☒=7	☐=0	☐=16
–	–	Whirlpool N/A	☐	☐	☐	☐
–	–	Air conditioning N/A	☐	☐	☐	☐
1.0	–	Emergency call button N/A	☒=1	☐=0	☐=0	☐=25
1.5	0.5	Alarm system	☒=6	☒=5	☐=0	☐=15
1.4	0.6	Wheelchair access	☒=9	☐=4	☒=1	☐=12

MEAN	STANDARD DEVIATION	AMENITIES	1= Very Satisfied	2=Somewhat Satisfied	3=Not Satisfied	Was Not Offered
1.4	0.7	Recreation facilities	☒=13	☐=4	☒=2	☐=10
1.3	0.6	Open outdoor spaces	☒=20	☐=5	☒=2	☐=3
1.6	0.6	Social activities	☒=10	☐=9	☒=1	☐=9
		MANAGEMENT				
1.6	0.7	Owner's association	☒=11	☐=10	☒=2	☐=6
1.6	0.6	Involvement opportunities	☒=7	☐=9	☒=1	☐=6
1.2	0.4	~~Condominium~~ fees	☒=8	☒=2	☐=0	☐=9
1.4	0.6	General restrictions	☒=11	☐=6	☒=1	☐=4
1.3	0.5	Resale restrictions	☒=11	☒=5	☐=0	☐=6
1.6	0.7	Management effectiveness	☒=9	☐=6	☒=2	☐=8

10. Would you **RECOMMEND** a **PARKVALE ESTATE** complex to friends? (check one)

n=37

%	
73.0	☐ I definitely would
16.2	☐ I probably would
5.4	☐ I do not know
5.4	☐ I probably would not
0	☐ I definitely would not

11. If you had the **OPTION OF MAKING THE CHOICE OVER AGAIN**, would you buy a **PARKVALE ESTATES** UNIT?

n=37

%	
78.4	☐ Yes
10.8	☐ Maybe, I do not really know
10.8	☐ No (please indicate why not: _____)

12. If you were a **DEVELOPER/BUILDER**, what would you **CHANGE** in another retirement village development? (This may include ideas about the complex, the units, and the management)

NOT CODED - SEE SECTION 9 IMPROVEMENTS

GENERAL

13. **WHICH** of the following statements would **BEST DESCRIBE YOUR INVOLVEMENT** in the development of your **PARKVALE ESTATES COMPLEX**? (check one)

n=35

%	
54.3	☐ Able to choose only the interior features/options of my unit
22.9	☐ Had a say in my unit's interior features and in the amenities building
17.1	☐ Was asked for input on several things, including the overall complex design, the amenities to be offered, and the units
5.7	☐ Had no say at all

14. How has your **LIFESTYLE** (the way you live) **CHANGED** since moving to **PARKVALE?** (check all they apply)

	%	Level of Activity		
		Less	Same	More
Social activity $n=33$	12.1	☐	45.5 ☐	42.4 ☐
Physical activity $n=31$	9.7	☐	48.4 ☐	41.9 ☐
Leisure time $n=35$	5.7	☐	31.4 ☐	62.9 ☐
Travel $n=32$	18.8	☐	50.0 ☐	31.3 ☐
Extra spending money $n=26$	11.5	☐	57.7 ☐	30.8 ☐
Other (specify: $n=5$ 20.)	0	☐	20.0 ☐	60.0 ☐

15. Which of the following **SUPPORT SERVICES** would you **LIKE** to have available to **PARKVALE ESTATES RESIDENTS** when the need arises?

$n=37$

%	
5.4	☐ On-site medical clinic
2.7	☐ 24 hour nurse
27.0	☐ Emergency call buttons or systems
10.8	☐ Meal service
5.4	☐ Wheelchair access
10.8	☐ Resident van and driver
2.7	☐ On-site pharmacy service
13.5	☐ Housekeeping/home help services
8.1	☐ Personal help services
43.2	☐ None of the above, will arrange on own

YOUR PREVIOUS HOME

16. What **TYPE OF RESIDENCE** did you live in **BEFORE** moving to Parkvale Estates?

$n=37$

%	
78.4	☐ House
16.2	☐ Apartment or duplex
2.7	☐ Condominium
2.7	☐ Other

17. Was your **PREVIOUS HOME** in Red Deer?

$n=37$

%	
73.0	☐ Yes
16.2	☐ No ☐ Another city (specify: _____)
10.8	☐ Rural area (specify: _____)

18. **HOW LONG** did you live in your **PREVIOUS** home?

$n=37$

%	
18.9	☐ Less than 5 years
24.3	☐ 6 - 10 years
10.8	☐ 11 - 20 years
45.9	☐ More than 20 years

19. Did you **RENT** or **OWN** your **PREVIOUS** home?

%	
91.9	☐ Own (please go to question 20)
8.1	☐ Rent (please go to question 21)

n=37

20. Which of the following **BEST** indicates the amount of **MORTGAGE** which was remaining on your **PREVIOUS** home?

%	
93.6	☐ Clear title/no mortgage
0	☐ Less than $10,000
0	☐ $10,000 - $19,999
3.2	☐ $20,000 - $29,999
0	☐ $30,000 - $39,999
3.2	☐ $40,000 or more

n=31

YOUR PARKVALE HOME

21. When you **PURCHASED** a unit in **PARKVALE ESTATES** did you:

%	
91.4	☐ Sell you previous home?
2.9	☐ Rent out your previous home?
5.7	☐ Other? (please explain: _____)

n=35

22. Is the amount you **PAID** for your **PARKVALE UNIT**:

%	
48.6	☐ Less than the value of your previous home?
17.1	☐ More than the value of your previous home?
34.3	☐ About the same value as your previous home?

n=35

23. When you **PURCHASED A UNIT** in **PARKVALE**, did you:

%	
15.2	☐ Take out a mortgage or loan?
84.8	☐ Obtain clear title _____ (please go to question 25)

n=33

24. Which best indicates your **PRESENT MORTGAGE** or **LOAN**?

n=	
0	☐ Less than $10,000
0	☐ $10,000 - $19,999
0	☐ $20,000 - $29,999
0	☐ $30,000 - $39,999
3	☐ $40,000 or more

n=3

(28 clear title)

25. Is your **PARKVALE ESTATES** unit:

%	
73.0	☐ Smaller than your previous home?
10.8	☐ Larger than your previous home?
16.2	☐ About the same size as your previous home?

n=37

26. What is the approximate SIZE of your **PARKVALE ESTATES** home?

%	
45.7	☐ Less than 1,000 square feet
51.4	☐ 1,000 - 1,499 square feet
2.9	☐ 1,500 - 2,000 square feet
0	☐ More than 2,000 square feet

n= 35

27. Do you expect your move to **PARKVALE ESTATES** to be your **FINAL MOVE**?

%	
75.7	☐ Yes
8.1	☐ No
16.2	☐ Do not know/ have not thought about it

n=37

28. What would cause you to **MOVE** from Parkvale Estates? (you may check more than one item)

%	
75.7	☐ Severe health problems
10.8	☐ Financial issues
8.1	☐ Stay close to family who move
27.0	☐ To live in a milder climate
5.4	☐ Other (please specify: _____)

n=28

THE PEOPLE IN YOUR HOME

29. MARITAL STATE?

%			
56.8	☐ Married	☐ Single 0	☐ Other 0
5.4	☐ Divorced/Separated	☐ Widowed 37.8	

n=37

IT IS IMPORTANT THAT ALL RESIDENTS OF HORIZON VILLAGE BE INCLUDED IN THE STUDY RESULTS. FOR COUPLES, PLEASE AMSWER FOR BOTH THE MALE AND FEMALE MEMBER OF THE HOUSEHOLD. IF ONLY ONE PERSON LIVES IN THE HOME, PLEASE CHECK ONLY THE APPROPRIATE COLUMN.

30. AGE?

%		n=35 FEMALE	n=20 MALE
	Less than 50 years	11.4 ☐	☐ 5.0
	50 - 55 years	8.6 ☐	☐ 10.0
	56 - 60 years	5.7 ☐	☐ 0
	61 - 65 years	17.1 ☐	☐ 15.0
	66 - 70 years	20.0 ☐	☐ 20.0
	71 - 75 years	25.7 ☐	☐ 40.0
	76 - 80 years	8.6 ☐	☐ 5.0
	Over 80 years	2.9 ☐	☐ 5.0

31. What is the highest level of **EDUCATION** achieved?

	%	n=32 FEMALE	n=18 MALE
High school or less		59.4 ☐	☐ 72.2
College or technical school		18.8 ☐	☐ 22.2
University		21.9 ☐	☐ 5.6

32. Current **EMPLOYMENT** ?

	%	n=36 FEMALE	n=20 MALE
Full time		11.1 ☐	☐ 20.0
Part time		5.6 ☐	☐ 0
Self employed/owner		0 ☐	☐ 5.0
Retired		75.0 ☐	☐ 70.0
Not employed		8.3 ☐	☐ 5.0

33. **PRIMARY** lifetime **OCCUPATION** ?

	%	n=35 FEMALE	n=20 MALE
Homemaker		37.1 ☐	☐ 0
Managerial		2.9 ☐	☐ 35.0
Professional		22 9 ☐	☐ 5.0
Technical		2.9 ☐	☐ 10.0
Clerical		11.4 ☐	☐ 5.0
Office		5.7 ☐	☐ 0
Sales		8.6 ☐	☐ 25.0
Skilled		2.9 ☐	☐ 5.0
Unskilled		2.9 ☐	☐ 5.0
Farming		2.9 ☐	☐ 10.0
Other (specify: _____)		0 ☐	☐ 0

34. Other than Canadian, what is your **ETHNIC BACKGROUND** ?

	%	n=32 FEMALE	n=18 MALE
German		18.8 ☐	☐ 22.2
Ukrainian		0 ☐	☐ 0
Polish		0 ☐	☐ 0
Italian		0 ☐	☐ 0
Greek		0 ☐	☐ 0
Portuguese		0 ☐	☐ 0
Irish		18.8 ☐	☐ 0
English		25.0 ☐	☐ 33.3
Scottish		12.5 ☐	☐ 22.2
Dutch		9.4 ☐	☐ 5.6
Chinese		0 ☐	☐ 0
Other (specify: _____)		15.6 ☐	☐ 16.7

35. How would you describe you and your spouse's present **HEALTH**?

	%	n=33 FEMALE	n=20 MALE
Excellent	33.3	☐	☐ 20.0
Satisfactory	63.6	☐	☐ 70.0
Poor	3.0	☐	☐ 10.0

36. Did you **TRAVEL** outside Alberta during the last year?

n=37

%	
83.8	☐ Yes
16.2	☐ No _____ → Please go to question 39.

37. If you **TRAVELLED** outside Alberta, did you: (you may check more than one)

n=30

%		%	
20.0	☐ Travel during the summer?	3.3	☐ Travel during the fall?
23.3	☐ Travel during the winter?	10.0	☐ Travel during the spring?

26.7 – 2 seasons
10.0 – 3 seasons
6.7 – all seasons

38. If you **TRAVELLED** outside Alberta, **HOW LONG** (<u>in total</u>) were you away?

n=30

%	
51.6	☐ Less than one month
22.6	☐ 1 - 2 months
6.4	☐ 3 - 4 months
19.4	☐ 5 - 6 months
0	☐ More than 6 months

39. How many **VEHICLES** do you own?

n=37

%	
8.1	☐ None
54.1	☐ One
35.1	☐ Two
2.7	☐ Three or more

40. Which of the following groups best describes your **TOTAL HOUSEHOLD INCOME AND EARNINGS** (before taxes) for 1986?

n=29

%	
31.0	☐ Under $20,000
27.6	☐ $20,000 - $29,999
10.3	☐ $30,000 - $39,999
20.7	☐ $40,000 - $49,999
3.4	☐ $50,000 - $59,999
0	☐ $60,000 - $69,999
6.9	☐ $70,000 and over

41. Please indicate **WHO ANSWERED** this survey questionnaire.

n=36

%	
52.8	☐ FEMALE HEAD OF HOUSEHOLD
13.9	☐ MALE HEAD OF HOUSEHOLD
33.3	☐ BOTH

n = 22

PARKVALE ESTATES RESULTS

RESIDENTIAL SURVEY

YOUR DECISION TO MOVE

The questions in this section are about your **THINKING BEFORE YOU BOUGHT** in Parkvale Estates.

1 a). Please check **[✓] ALL** the **REASONS** for **YOUR MOVE** from your **PREVIOUS HOME.**

%		
0	1.	Previous home too small
36.4	2.	Previous home too large
77.3	3.	Too much outdoor maintenance
18.2	4.	Home needed major repairs
4.5	5.	Neighborhood unsafe
45.5	6.	Too many stairs
50.0	7.	No main floor laundry facilities
27.3	8.	Not close to community services (shopping, health care, etc.)
9.0	9.	Not close to public transportation
22.7	10.	Home difficult to look after
0	11.	Financial reasons
0	12.	Home too costly
13.6	13.	Death of spouse
13.6	14.	Loneliness
31.8	15.	Health reasons
13.6	16.	Need for more privacy
59.1	17.	Wish to be with mature age group
40.9	18.	Family encouraged the move
13.6	19.	To be near family/friends
40.9	20.	Other (please specify: _____)

1 b). From the **ABOVE** list, which were the **MOST IMPORTANT REASONS** for moving? (please use the number listed in front of the reason)

	* 3 was the most important reason	using multiple response analysis
tie	* 17, 18 was the 2nd most important reason	
	* ____ was the 3rd most important reason	
tie	* 6, 7 was the 4th most important reason	
	* ____ was the 5th most important reason	

2. Which of the following **TYPES OF HOUSING** did you seriously **CONSIDER** before moving? (check **[✓]** all that apply) [**Note**: apartments and condominiums are **non-subsidized**]

59.1	☐	To remain where you were
18.2	☐	A house
4.5	☐	A high rise apartment
0	☐	A high rise apartment for seniors
13.6	☐	A low rise apartment
22.7	☐	A low rise apartment for seniors
0	☐	A high rise condominium
4.5	☐	A high rise condominium for seniors
0	☐	A nursing home
4.5	☐	A lodge
13.6	☐	Shared housing (among own age group)
0	☐	Live in children's home

3. How did you **FIRST HEAR ABOUT PARKVALE ESTATES?**(check one)

n=20

%	
10.0	☐ Television
0	☐ Radio
30.0	☐ Advertisement in a newspaper
0	☐ Advertisement in a magazine
55.0	☐ Family or friends
0	☐ Drove by and saw the sales office
0	☐ Parkvale Estates information centre
5.0	☐ Other (please specify: _____)

4 a). When you were **THINKING** about buying a **PARKVALE ESTATE** unit, **HOW IMPORTANT** were EACH of the following factors? (check [✓] one box for each item)

MEAN	STANDARD DEVIATION		X = max., min.	1 = Very Important	2 = Important	3 = Unimportant	4 = Very Unimportant	Do Not Know
1.5	0.6	1.	Initial cost	☒ =11	☐ =9	☒ =1	☐	☐ =0
1.9	0.7	2.	On-going cost/monthly costs	☒ =4	☐ =8	☒ =3	☐	☐ =0
2.5	0.9	3.	Close to current neighborhood	☒ =2	☐ =3	☐ =6	☒ =1	☐ =0
2.3	0.9	4.	Close to family/friends	☒ =3	☐ =6	☐ =5	☒ =1	☐ =0
1.8	0.9	5.	Close to public transportation	☒ =7	☐ =6	☐ =2	☒ =1	☐ =0
1.9	0.8	6.	Social activities	☒ =6	☐ =8	☒ =4	☐	☐ =0
1.9	0.6	7.	Recreational activities	☒ =5	☐ =14	☒ =2	☐	☐ =0
1.6	0.6	8.	Restricted to age 50 and over	☒ =9	☐ =9	☒ =1	☐	☐ =0
1.4	0.5	9.	Safety/security features	☒ =13	☒ =7	☐	☐	☐ =0
1.7	0.6	10.	Design of individual unit	☒ =8	☐ =11	☒ =1	☐	☐ =0
1.9	0.7	11.	Parking	☒ =4	☐ =8	☒ =3	☐	☐ =0
1.7	0.5	12.	Appearance of the buildings	☒ =5	☒ =13	☐	☐	☐ =0
1.3	0.5	13.	Maintenance free exteriors (snow removal, grass cutting, etc.)	☒ =15	☒ =6	☐	☐	☐ =0
1.7	0.7	14.	Close to health services	☒ =7	☐ =9	☒ =2	☐	☐ =0
1.8	0.6	15.	Close to shopping	☒ =6	☐ =11	☒ =2	☐	☐ =0
1.4	0.6	16.	Opportunity for ownership	☒ =11	☐ =5	☒ =1	☐	☐ =0
1.7	0.8	17.	Purchasing in a new complex	☒ =6	☐ =5	☒ =2	☐	☐ =0
1.7	0.6	18.	Resale value	☒ =7	☐ =10	☒ =1	☐	☐ =0
1.9	0.9	19.	No children allowed	☒ =7	☐ =6	☐ =3	☒ =1	☐ =0
1.4	0.5	20.	Quality of construction	☒ =11	☒ =8	☐	☐	☐ =0

4 b). From the **ABOVE** list, which were the **5 MOST IMPORTANT FACTORS?** (please use the number listed in front of the reason)

- # 1 was the most important reason
- # 13 was the 2nd most important reason
- # 9 was the 3rd most important reason
- tie # 8,20 was the 4th most important reason
- # ____ was the 5th most important reason

using multiple response analysis

5. When you were **LOOKING** for a new home **HOW IMPORTANT** were the following **HOME FEATURES** to you? (please check [✓] a box for **EACH** feature)

MEAN	STANDARD DEVIATION		1= Very Important	2= Important	3= Unimportant	4= Very Unimportant
		LOCATION X=max., min.				
2.1	0.9	Distance to transit stop	☒=5	☐=7	☐=4	☒=1
2.4	0.5	Distance to place of worship	☐	☒=10	☒=6	☐
1.8	0.8	Distance to health services	☒=7	☐=8	☒=4	☐
1.9	0.6	Distance to shopping/services (n)	☒=5	☐=13	☒=2	☐
2.1	0.7	Distance to family/friends	☒=4	☐=9	☒=6	☐
2.4	1.0	Distance to parks/lake	☒=4	☐=4	☐=6	☒=2
1.5	0.6	Quiet neighborhood	☒=13	☐=8	☒=1	☐
		LOT				
1.5	0.6	Privacy	☒=10	☐=7	☒=1	☐
1.6	0.5	Size	☒=7	☒=12	☐	☐
1.5	0.7	View	☒=11	☐=6	☒=2	☐
1.5	0.5	Landscaping	☒=10	☒=10	☐	☐
1.7	0.6	Direction facing (for sun)	☒=8	☐=11	☒=1	☐
		EXTERIOR OF HOME				
1.6	0.5	Patio area	☒=9	☒=11	☐	☐
1.4	0.6	Attached garage	☒=14	☐=5	☒=1	☐
1.7	0.6	Parking	☒=6	☐=9	☒=1	☐
1.4	0.5	No steps	☒=13	☒=9	☐	☐
1.3	0.5	Low maintenance (snow removal, etc.)	☒=15	☒=7	☐	☐
2.3	0.6	Covered entrance	☒=1	☐=9	☒=5	☐
1.8	0.6	Type of windows	☒=7	☐=12	☒=2	☐
		INTERIOR OF HOME				
1.4	0.5	Efficient floor plan	☒=13	☒=8	☐	☐
1.4	0.5	Good use of space	☒=13	☒=9	☐	☐
[illegible]	0.4	Full basement	☐	☐	☒=3	☒=10
1.4	0.5	Single level (bungalow)	☒=11	☒=6	☐	☐
2.5	1.2	Sun room	☒=3	☐=3	☐=3	☒=3
1.5	0.8	Few stairs	☒=9	☐=5	☐=0	☒=1
1.4	0.5	Convenient kitchen	☒=13	☒=9	☐	☐
1.4	0.5	Kitchen cupboards	☒=13	☒=8	☐	☐
1.5	0.5	Laundry area	☒=11	☒=10	☐	☐
1.5	0.5	Storage	☒=10	☒=9	☐	☐
1.6	0.5	Lighting	☒=9	☒=11	☐	☐
1.5	0.5	Electrical outlet convenience	☒=11	☒=9	☐	☐
2.4	0.9	Lever-type door handles	☒=2	☐=5	☐=5	☒=1
2.0	0.7	Lever-type faucets	☒=4	☐=9	☒=4	☐
1.7	0.7	Bathroom safety bars	☒=9	☐=8	☒=3	☐
1.6	0.5	Flooring	☒=9	☒=12	☐	☐

MEAN	STANDARD DEVIATION		1= Very Important	2= Important	3= Unimportant	4= Very Unimportant
		OPTIONAL FEATURES				
3.3	0.6	Fireplace	☐	☒=1	☐=10	☒=5
3.3	0.8	Whirlpool	☒=1	☐=0	☐=9	☒=6
2.9	0.8	Air conditioning	☒=1	☐=2	☐=10	☒=3
2.8	0.6	Emergency call button	☐	☒=3	☐=7	☒=1
2.0	1.0	Alarm system	☒=7	☐=4	☐=5	☒=1
2.4	0.6	Wheelchair access	☒=1	☐=8	☒=7	☐
		AMENITIES				
1.7	0.5	Near recreation facilities	☒=6	☒=13	☐	☐
1.6	0.5	Near social activities	☒=7	☒=10	☐	☐

6. When **CONSIDERING** the purchase of a **PARKVALE ESTATE UNIT**, who had the **MOST INFLUENCE** on the buying decision? (check [✓] one)

n= 20

%	
80.0	☐ No one, I/we made the decision alone
0	☐ Brother or sister
20.0	☐ Adult child
0	☐ Parent
0	☐ Other relative
0	☐ Friend
0	☐ Salesperson
0	☐ Other (please specify: _____)

7. How long did you **LOOK** for a new home?

n=16

%	
50.0	☐ 1 - 4 weeks
12.5	☐ 1 - 5 months
6.3	☐ 6 - 12 months
0	☐ 1 - 2 years
25.0	☐ 2 - 3 years
6.3	☐ more than 3 years

YOUR CHOICE - PARKVALE ESTATES

The questions in the following section are about **YOUR DECISION TO BUY** in Parkvale.

8 a). Please check [✓] ALL your REASONS for BUYING a PARKVALE unit.

%		
90.9	1.	Mature adult community (age 50 and over)
54.5	2.	Companionship
68.2	3.	Worry-free travel
59.1	4.	Community spirit
90.9	5.	Independence maintained
31.8	6.	Gained money from previous home sale
54.5	7.	With similar people
72.7	8.	Suitable lifestyle
0	9.	Force by family to purchase
54.5	10.	More leisure time
40.9	11.	Living costs reduced
77.3	12.	Affordable
81.8	13.	Pride of ownership
72.7	14.	Good resale value
63.6	15.	Safety/physical security
86.4	16.	Attractive complex
54.5	17.	Nothing else like Parkvale was available
72.7	18.	A new place
95.5	19.	Convenient location
86.4	20.	No outdoor maintenance
N/A	21.	Recreation building
31.8	22.	Social activities
22.7	23.	Country atmosphere
54.5	24.	Several floor plans/options available
72.7	25.	Good size
100.0	26.	Easy to housekeep
81.8	27.	Special design features for seniors
50.0	28.	No children
13.6	29.	Recreational vehicle storage
4.5	30.	Other (please specify: _____)

8 b) From the ABOVE list, which were the 5 MOST IMPORTANT REASONS for BUYING a PARKVALE ESTATES UNIT? (please use the number listed in front of the reason)

- # 19 was the most important reason
- # 20 was the 2nd most important reason
- # 1 was the 3rd most important reason
- # 3 was the 4th most important reason
- # 12 was the 5th most important reason

using multiple response analysis

YOUR LEVEL OF SATISFACTION

9. Please indicate your SATISFACTION with the following aspects of PARKVALE. (check [✓] a box for EACH aspect)

MEAN	STANDARD DEVIATION	LOCATION X = min, max	1= Very Satisfied	2= Somewhat Satisfied	3= Not Satisfied	Was Not Offered
1.8	0.7	Distance to transit stop	☒=8	☐=10	☒=4	☐
1.4	0.5	Distance to place of worship	☒=12	☒=9	☐	☐
1.1	0.3	Distance to health services (n)	☒=19	☒=2	☐	☐
1.1	0.3	Distance to shopping/services	☒=20	☒=2	☐	☐
1.2	0.4	Distance to family/friends	☒=15	☒=4	☐	☐
1.1	0.3	Distance to parks/lake	☒=15	☒=2	☐	☐
1.0	0	Quiet neighborhood	☐=20	☐	☐	☐

MEAN	STANDARD DEVIATION	LQI	1= Very Satisfied	2=Somewhat Satisfied	3=Not Satisfied	Was Not Offered
1.3	0.5	Privacy	☒=15	☒=6	☐	☐
1.2	0.5	Size	☒=17	☐=3	☒=1	☐
1.2	0.4	View	☒=17	☒=4	☐	☐
1.1	0.4	Landscaping	☒=19	☒=3	☐	☐
1.1	0.5	Direction facing (for sun)	☒=19	☐=1	☒=1	☐
		EXTERIOR OF HOME				
1.3	0.6	Patio area	☒=17	☐=2	☒=2	☐
1.2	0.5	Attached garage	☒=18	☐=1	☒=1	☐
1.7	0.8	Parking	☒=6	☐=5	☒=2	☐=2
1.1	0.4	No steps	☒=20	☐=0	☒=1	☐
1.3	0.6	Maintenance (snow removal, etc.)	☒=16	☐=5	☒=1	☐
1.9	0.8	Covered entrance	☒=3	☐=?	☒=2	☐=5
1.2	0.4	Type of windows	☒=17	☒=5	☐	☐
		INTERIOR OF HOME				
1.1	0.4	Efficient floor plan	☒=18	☒=3	☐	☐
1.1	0.3	Good use of space	☒=19	☒=2	☐	☐
N/A		Full basement	☐	☐	☐	☒
1.0	0	Single level (bungalow)	☐=17	☐	☐	☐
2.0	1.0	Sun room	☒=2	☐=1	☒=2	☐=7
1.0	0	Few stairs	☐=13	☐	☐	☐=1
1.0	0	Convenient kitchen	☐=22	☐	☐	☐
1.0	0.2	Kitchen cupboards	☒=21	☒=1	☐	☐
1.1	0.4	Laundry area	☒=19	☒=3	☐	☐
1.6	0.7	Storage	☒=9	☐=8	☒=2	☐
1.1	0.2	Lighting	☒=19	☒=1	☐	☐
1.1	0.2	Electrical outlet convenience	☒=19	☒=1	☐	☐
1.3	0.5	Lever-type door handles	☒=3	☒=1	☐	☐=7
1.1	0.3	Lever-type faucets	☒=10	☒=1	☐	☐=2
1.2	0.4	Bathroom safety bars	☒=16	☒=3	☐	☐
1.1	0.5	Flooring	☒=20	☐=1	☒=1	☐
		OPTIONAL FEATURES				
N/A		Fireplace	☐	☐	☐	☒
N/A		Whirlpool	☐	☐	☐	☒
N/A		Air conditioning	☐	☐	☐	☒
1.0	0	Emergency call button	☐=1	☐	☐	☐=14
1.3	0.5	Alarm system	☒=5	☒=2	☐	☐=8
1.3	0.5	Wheelchair access	☒=8	☒=4	☐	☐=3

MEAN	STANDARD DEVIATION	AMENITIES	1= Very Satisfied	2=Somewhat Satisfied	3=Not Satisfied	Was Not Offered
1.6	0.8	Recreation facilities	☒=6	☐=3	☒=2	☐=5
1.4	0.7	Open outdoor spaces	☒=12	☐=3	☒=2	☐
1.5	0.7	Social activities	☒=7	☐=5	☒=1	☐=3
		MANAGEMENT				
1.5	0.6	Owner's association	☒=9	☐=6	☒=1	☐
1.5	0.5	Involvement opportunities	☒=6	☒=5	☐	☐=1
1.2	0.4	~~Condominium fees~~	☒=7	☒=2	☐	☐=1
1.3	0.6	General restrictions	☒=9	☐=1	☒=1	☐
1.2	0.4	Resale restrictions	☒=9	☒=2	☐	☐=1
1.5	0.6	Management effectiveness	☒=9	☐=5	☐=1	☐

10. Would you **RECOMMEND** a **PARKVALE ESTATE** complex to friends? (check one)

n=22

%	
81.8	☐ I definitely would
13.6	☐ I probably would
0	☐ I do not know
4.5	☐ I probably would not
0	☐ I definitely would not

11. If you had the **OPTION OF MAKING THE CHOICE OVER AGAIN**, would you buy a **PARKVALE ESTATES** UNIT?

n=22

%	
86.4	☐ Yes
9.1	☐ Maybe, I do not really know
4.5	☐ No (please indicate why not: _____)

12. If you were a **DEVELOPER/BUILDER**, what would you **CHANGE** in another retirement village development? (This may include ideas about the complex, the units, and the management)

_____

_____

_____

_____

GENERAL

13. **WHICH** of the following statements would **BEST DESCRIBE YOUR INVOLVEMENT** in the development of your **PARKVALE ESTATES** COMPLEX ? (check one)

n=21

%	
33.3	☐ Able to choose only the interior features/options of my unit
28.6	☐ Had a say in my unit's interior features and in the amenities building
28.6	☐ Was asked for input on several things, including the overall complex design, the amenities to be offered, and the units
9.5	☐ Had no say at all

14. How has your **LIFESTYLE** (the way you live) **CHANGED** since moving to **PARKVALE?** (check all they apply)

	%	Level of Activity: Less	Same	More
Social activity n=20		☐ 15.0	☐ 45.0	☐ 40.0
Physical activity n=17		☐ 11.8	☐ 52.9	☐ 35.3
Leisure time n=21		☐ 4.8	☐ 33.3	☐ 61.9
Travel n=20		☐ 10.0	☐ 65.0	☐ 25.0
Extra spending money n=16		☐ 12.5	☐ 62.5	☐ 25.0
Other (specify: n=5)		☐ 20.0	☐ 20.0	☐ 60.0

15. Which of the following **SUPPORT SERVICES** would you **LIKE** to have available to **PARKVALE ESTATES RESIDENTS** when the need arises?

%	
0	☐ On-site medical clinic
0	☐ 24 hour nurse
31.8	☐ Emergency call buttons or systems
13.6	☐ Meal service
0	☐ Wheelchair access
9.1	☐ Resident van and driver
0	☐ On-site pharmacy service
9.1	☐ Housekeeping/home help services
0	☐ Personal help services
45.5	☐ None of the above, will arrange on own

YOUR PREVIOUS HOME

16. What **TYPE OF RESIDENCE** did you live in **BEFORE** moving to Parkvale Estates?

n=22

%	
77.3	☐ House
18.2	☐ Apartment or duplex
0	☐ Condominium
4.5	☐ Other

17. Was your **PREVIOUS HOME** in Red Deer?

n=22

%		
77.3	☐ Yes	
22.7	☐ No	13.6 ☐ Another city (specify:)
		9.1 ☐ Rural area (specify:)

18. **HOW LONG** did you live in your **PREVIOUS** home?

n=22

%	
9.1	☐ Less than 5 years
13.6	☐ 6 - 10 years
13.6	☐ 11 - 20 years
63.6	☐ More than 20 years

19. Did you **RENT** or **OWN** your **PREVIOUS** home?

n=22

%	
100	☐ Own (please go to question 20)
0	☐ Rent (please go to question 21)

20. Which of the following **BEST** indicates the amount of **MORTGAGE** which was remaining on your **PREVIOUS** home?

n=20

%	
95.0	☐ Clear title/no mortgage
0	☐ Less than $10,000
0	☐ $10,000 - $19,999
0	☐ $20,000 - $29,999
0	☐ $30,000 - $39,999
5.0	☐ $40,000 or more

YOUR PARKVALE HOME

21. When you **PURCHASED** a unit in **PARKVALE ESTATES** did you:

n= 22

%	
95.5	☐ Sell you previous home?
0	☐ Rent out your previous home?
4.5	☐ Other? (please explain: _____)

22. Is the amount you **PAID** for your **PARKVALE UNIT**:

n=22

%	
63.6	☐ Less than the value of your previous home?
9.1	☐ More than the value of your previous home?
27.3	☐ About the same value as your previous home?

23. When you **PURCHASED A UNIT** in **PARKVALE**, did you:

n=20

%	
0	☐ Take out a mortgage or loan?
100	☐ Obtain clear title _____ (please go to question 25)

24. Which best indicates your **PRESENT MORTGAGE** or **LOAN**?

N/A

- ☐ Less than $10,000
- ☐ $10,000 - $19,999
- ☐ $20,000 - $29,999
- ☐ $30,000 - $39,999
- ☐ $40,000 or more

25. Is your **PARKVALE ESTATES** unit:

%	
90.9	☐ Smaller than your previous home?
4.5	☐ Larger than your previous home?
4.5	☐ About the same size as your previous home?

n=22

26. What is the approximate SIZE of your **PARKVALE ESTATES** home?

%	
70.0	☐ Less than 1,000 square feet
30.0	☐ 1,000 - 1,499 square feet
0	☐ 1,500 - 2,000 square feet
0	☐ More than 2,000 square feet

n=20

27. Do you expect your move to **PARKVALE ESTATES** to be your **FINAL MOVE**?

%	
86.4	☐ Yes
0	☐ No
13.6	☐ Do not know/ have not thought about it

n=22

28. What would cause you to **MOVE** from Parkvale Estates? (you may check more than one item)

%	
81.8	☐ Severe health problems
0	☐ Financial issues
13.6	☐ Stay close to family who move
22.7	☐ To live in a milder climate
0	☐ Other (please specify: _____)

THE PEOPLE IN YOUR HOME

29. MARITAL STATE?

%					
54.5	☐ Married	☐ Single	0	☐ Other	0
4.5	☐ Divorced/Separated	☐ Widowed	40.9		

n=22

IT IS IMPORTANT THAT ALL RESIDENTS OF HORIZON VILLAGE BE INCLUDED IN THE STUDY RESULTS. FOR COUPLES, PLEASE AMSWER FOR BOTH THE MALE AND FEMALE MEMBER OF THE HOUSEHOLD. IF ONLY ONE PERSON LIVES IN THE HOME, PLEASE CHECK ONLY THE APPROPRIATE COLUMN.

30. AGE?

	n=22 FEMALE	n=12 MALE
Less than 50 years	0 ☐	☐ 0
50 - 55 years	0 ☐	☐ 0
56 - 60 years	4.5 ☐	☐ 0
61 - 65 years	18.2 ☐	☐ 8.3
66 - 70 years	27.3 ☐	☐ 33.3
71 - 75 years	31.8 ☐	☐ 41.7
76 - 80 years	13.6 ☐	☐ 8.3
Over 80 years	4.5 ☐	☐ 8.3

31. What is the highest level of **EDUCATION** achieved?

	%	n=19 FEMALE	n=10 MALE
High school or less		63.2 ☐	☐ 80.0
College or technical school		21.1 ☐	☐ 20.0
University		15.8 ☐	☐ 0

32. Current **EMPLOYMENT** ?

	%	n=22 FEMALE	n=11 MALE
Full time		0 ☐	☐ 0
Part time		0 ☐	☐ 0
Self employed/owner		0 ☐	☐ 9.1
Retired		90.9 ☐	☐ 81.8
Not employed		9.1 ☐	☐ 9.1

33. **PRIMARY** lifetime **OCCUPATION** ?

	%	n=22 FEMALE	n=12 MALE
Homemaker		36.4 ☐	☐ 0
Managerial		0 ☐	☐ 33.3
Professional		18.2 ☐	☐ 0
Technical		0 ☐	☐ 8.3
Clerical		18.2 ☐	☐ 0
Office		4.5 ☐	☐ 0
Sales		9.1 ☐	☐ 33.3
Skilled		4.5 ☐	☐ 8.3
Unskilled		4.5 ☐	☐ 8.3
Farming		4.5 ☐	☐ 8.3
Other (specify: _____)		— ☐	☐ —

34. Other than Canadian, what is your **ETHNIC BACKGROUND** ?

	%	n=20 FEMALE	n=11 MALE
German		15.0 ☐	☐ 18.2
Ukrainian		0 ☐	☐ 0
Polish		0 ☐	☐ 0
Italian		0 ☐	☐ 0
Greek		0 ☐	☐ 0
Portuguese		0 ☐	☐ 0
Irish		25.0 ☐	☐ 0
English		15.0 ☐	☐ 27.3
Scottish		10.0 ☐	☐ 27.3
Dutch		15.0 ☐	☐ 9.1
Chinese		0 ☐	☐ 0
Other (specify: _____)		20.0 ☐	☐ 18.2

35. How would you describe you and your spouse's present HEALTH?

	%	n=19 FEMALE		n=12 MALE
Excellent	31.6	☐	☐	8.3
Satisfactory	68.4	☐	☐	83.3
Poor	0	☐	☐	8.3

36. Did you TRAVEL outside Alberta during the last year?

n=22

%	
81.8	☐ Yes
18.2	☐ No _____ ≥ Please go to question 39.

37. If you TRAVELLED outside Alberta, did you: (you may check more than one)

n=17

%			
23.5	☐ Travel during the summer only?	5.9	☐ Travel during the fall? 29.4 - 2 seasons
17.6	☐ Travel during the winter?	17.6	☐ Travel during the spring? 5.9 - all seasons

38. If you TRAVELLED outside Alberta, HOW LONG (in total) were you away?

n=18

%	
55.6	☐ Less than one month
11.1	☐ 1 - 2 months
5.6	☐ 3 - 4 months
27.8	☐ 5 - 6 months
0	☐ More than 6 months

39. How many VEHICLES do you own?

n=22

%	
13.6	☐ None
50.0	☐ One
36.4	☐ Two
0	☐ Three or more

40. Which of the following groups best describes your TOTAL HOUSEHOLD INCOME AND EARNINGS (before taxes) for 1986?

n=17

%	
41.2	☐ Under $20,000
29.4	☐ $20,000 - $29,999
17.6	☐ $30,000 - $39,999
11.8	☐ $40,000 - $49,999
0	☐ $50,000 - $59,999
0	☐ $60,000 - $69,999
0	☐ $70,000 and over

41. Please indicate WHO ANSWERED this survey questionnaire.

n=21

%	
52.4	☐ FEMALE HEAD OF HOUSEHOLD
9.5	☐ MALE HEAD OF HOUSEHOLD
38.1	☐ BOTH

n= 15

RESIDENTIAL SURVEY

PARKVALE DOWNS RESULTS

YOUR DECISION TO MOVE

The questions in this section are about your **THINKING BEFORE YOU BOUGHT** in Parkvale Downs.

1 a). Please check [✓] **ALL** the **REASONS** for **YOUR MOVE** from your **PREVIOUS HOME.**

%		
0	1.	Previous home too small
26.7	2.	Previous home too large
60.0	3.	Too much outdoor maintenance
13.3	4.	Home needed major repairs
0	5.	Neighborhood unsafe
13.3	6.	Too many stairs
13.3	7.	No main floor laundry facilities
40.0	8.	Not close to community services (shopping, health care, etc.)
13.3	9.	Not close to public transportation
13.3	10.	Home difficult to look after
0	11.	Financial reasons
6.7	12.	Home too costly
13.3	13.	Death of spouse
6.7	14.	Loneliness
13.3	15.	Health reasons
0	16.	Need for more privacy
20.0	17.	Wish to be with mature age group
26.7	18.	Family encouraged the move
33.3	19.	To be near family/friends
33.3	20.	Other (please specify: _____)

1 b). From the **ABOVE** list, which were the **MOST IMPORTANT REASONS** for moving? (please use the number listed in front of the reason)

tie
- # 3 was the most important reason
- # 8, 19 was the 2nd most important reason
- # ____ was the 3rd most important reason
- # 2 was the 4th most important reason
- # 17 was the 5th most important reason

using multiple response analysis

2. Which of the following **TYPES OF HOUSING** did you seriously **CONSIDER** before moving ? (check [✓] all that apply) [**Note**: apartments and condominiums are **non-subsidized**]

33.3	☐ To remain where you were
46.7	☐ A house
6.7	☐ A high rise apartment
6.7	☐ A high rise apartment for seniors
6.7	☐ A low rise apartment
33.3	☐ A low rise apartment for seniors
6.7	☐ A high rise condominium
20.0	☐ A high rise condominium for seniors
0	☐ A nursing home
0	☐ A lodge
0	☐ Shared housing (among own age group)
0	☐ Live in children's home

3. How did you **FIRST HEAR ABOUT PARKVALE DOWNS?** (check one)

n=14

%	
0	☐ Television
0	☐ Radio
35.7	☐ Advertisement in a newspaper
0	☐ Advertisement in a magazine
35.7	☐ Family or friends
14.3	☐ Drove by and saw the sales office
7.1	☐ Parkvale Downs information centre
7.1	☐ Other (please specify: _____)

4 a). When you were **THINKING** about buying a **PARKVALE DOWNS** unit, **HOW IMPORTANT** were **EACH** of the following factors? (check [✓] one box for each item)

MEAN	STANDARD DEVIATION		x = max., min.	1= Very Important	2= Important	3= Unimportant	4= Very Unimportant	Do Not Know
1.8	0.7	1.	Initial cost	☒=5	☐=7	☒=2	☐	☐=0
1.8	0.6	2.	On-going cost/monthly costs	☒=4	☐=9	☒=1	☐	☐=0
2.6	1.0	3.	Close to current neighborhood	☒=2	☐=4	☐=5	☒=3	☐=0
2.3	1.2	4.	Close to family/friends	☒=3	☐=3	☐=5	☒=1	☐=1
2.7	0.8	5.	Close to public transportation	☐	☒=7	☐=5	☒=3	☐=0
2.6	0.9	6.	Social activities	☒=1	☐=6	☐=5	☒=2	☐=1
2.3	0.8	7.	Recreational activities	☒=1	☐=10	☐=2	☒=2	☐=0
2.3	0.9	8.	Restricted to age 50 and over	☒=2	☐=9	☐=2	☒=2	☐=0
1.6	0.5	9.	Safety/security features	☒=6	☒=8	☐	☐	☐=0
1.7	0.6	10.	Design of individual unit	☒=5	☐=8	☒=1	☐	☐=0
1.9	0.5	11.	Parking	☒=3	☐=10	☒=1	☐	☐=0
1.8	0.7	12.	Appearance of the buildings	☒=5	☐=7	☒=2	☐	☐=0
2.2	1.0	13.	Maintenance free exteriors (snow removal, grass cutting, etc.)	☒=2	☐=6	☐=2	☒=2	☐=2
2.1	0.8	14.	Close to health services	☒=2	☐=9	☐=2	☒=1	☐=0
2.1	0.7	15.	Close to shopping	☒=2	☐=10	☐=2	☒=1	☐=0
2.4	1.2	16.	Opportunity for ownership	☒=4	☐=4	☐=3	☒=3	☐=0
2.2	1.1	17.	Purchasing in a new complex	☒=4	☐=6	☐=1	☒=3	☐=0
2.0	1.0	18.	Resale value	☒=4	☐=8	☐=0	☒=2	☐=0
2.2	1.1	19.	No children allowed	☒=4	☐=4	☐=3	☒=2	☐=0
1.8	0.6	20.	Quality of construction	☒=4	☐=9	☒=1	☐	☐=0

4 b). From the **ABOVE** list, which were the **5 MOST IMPORTANT FACTORS?** (please use the number listed in front of the reason)

tie # 9,10 was the most important reason
____ was the 2nd most important reason
tie # 1,4 was the 3rd most important reason
____ was the 4th most important reason
tie # 2,8,20 was the 5th most important reason

using multiple response analysis

5. When you were **LOOKING** for a new home **HOW IMPORTANT** were the following **HOME FEATURES** to you? (please check [✓] a box for **EACH** feature)

MEAN	STANDARD DEVIATION		x = min., max. (n)	1 = Very Important	2 = Important	3 = Unimportant	4 = Very Unimportant
2.5	0.8	**LOCATION** Distance to transit stop		☒=1	☐=7	☐=5	☒=2
2.9	0.8	Distance to place of worship		☐	☒=5	☐=6	☒=3
2.3	0.7	Distance to health services		☒=1	☐=9	☐=3	☒=1
2.1	0.9	Distance to shopping/services		☒=3	☐=7	☐=3	☒=1
2.5	0.9	Distance to family/friends		☒=2	☐=4	☐=6	☒=1
2.2	0.7	Distance to parks/lake		☒=1	☐=10	☐=2	☒=1
1.6	0.5	Quiet neighborhood		☒=5	☒=9	☐	☐
		LOT					
1.8	0.6	Privacy		☒=4	☐=9	☒=1	☐
1.9	0.6	Size		☒=3	☐=9	☒=2	☐
2.0	0.6	View		☒=2	☐=10	☒=2	☐
1.9	0.5	Landscaping		☒=3	☐=10	☒=1	☐
1.8	0.7	Direction facing (for sun)		☒=5	☐=7	☒=2	☐
		EXTERIOR OF HOME					
2.0	0.4	Patio area		☒=1	☐=12	☒=1	☐
2.3	1.0	Attached garage		☒=3	☐=4	☐=4	☒=1
1.8	0.4	Parking		☒=3	☒=10	☐	☐
2.5	1.0	No steps		☒=3	☐=2	☐=7	☒=1
2.4	0.8	Low maintenance (snow removal, etc.)		☐	☒=10	☐=1	☒=2
2.3	0.8	Covered entrance		☒=1	☐=8	☐=2	☒=1
1.9	0.5	Type of windows		☒=2	☐=11	☒=1	☐
		INTERIOR OF HOME					
1.4	0.5	Efficient floor plan		☒=9	☒=5	☐	☐
1.4	0.5	Good use of space		☒=8	☒=6	☐	☐
1.9	0.9	Full basement		☒=5	☐=6	☐=2	☒=1
2.1	1.1	Single level (bungalow)		☒=5	☐=1	☐=4	☒=1
3.0	0.7	Sun room		☐	☒=2	☐=6	☒=2
2.5	0.9	Few stairs		☒=2	☐=2	☐=6	☒=1
1.7	0.5	Convenient kitchen		☒=4	☒=10	☐	☐
1.6	0.5	Kitchen cupboards		☒=5	☒=9	☐	☐
1.6	0.5	Laundry area		☒=6	☒=8	☐	☐
1.9	0.5	Storage		☒=2	☐=12	☒=1	☐
1.5	0.5	Lighting		☒=7	☒=7	☐	☐
1.6	0.6	Electrical outlet convenience		☒=6	☐=7	☒=1	☐
2.9	0.7	Lever-type door handles		☒=10	☐=0	☐=10	☒=1
2.8	0.6	Lever-type faucets		☐	☒=3	☐=8	☒=1
2.9	0.7	Bathroom safety bars		☐	☒=3	☐=7	☒=2
1.7	0.7	Flooring		☒=5	☐=6	☒=2	☐

MEAN	STANDARD DEVIATION		1 = Very Important	2 = Important	3 = Unimportant	4 = Very Unimportant
		OPTIONAL FEATURES				
2.4	0.8	Fireplace	☒=2	☐=6	☐=5	☒=1
3.3	0.6	Whirlpool	☐	☒=1	☐=9	☒=5
3.2	0.4	Air conditioning	☐	☐	☒=11	☒=3
3.3	0.5	Emergency call button	☐	☐	☑=10	☒=4
2.6	0.8	Alarm system	☒=1	☐=4	☐=7	☒=1
3.2	0.8	Wheelchair access	☒=1	☐=0	☐=7	☒=5
		AMENITIES				
2.2	0.8	Near recreation facilities	☒=2	☐=8	☐=3	☒=1
2.3	0.7	Near social activities	☒=1	☐=9	☐=3	☒=1.

6. When **CONSIDERING** the purchase of a **PARKVALE DOWNS UNIT**, who had the **MOST INFLUENCE** on the buying decision? (check [✓] one)

n=15

%	
86.7	☐ No one, I/we made the decision alone
6.7	☐ Brother or sister
6.7	☐ Adult child
0	☐ Parent
0	☐ Other relative
0	☐ Friend
0	☐ Salesperson
0	☐ Other (please specify: _____)

7. How long did you **LOOK** for a new home?

n=15

%	
53.3	☐ 1 - 4 weeks
20.0	☐ 1 - 5 months
13.3	☐ 6 - 12 months
13.3	☐ 1 - 2 years
0	☐ 2 - 3 years
0	☐ more than 3 years

YOUR CHOICE - PARKVALE DOWNS

The questions in the following section are about **YOUR DECISION TO BUY** in Parkvale.

8 a). Please check [✓] ALL your REASONS for BUYING a PARKVALE unit.

%

80.0 1. Mature adult community (age 50 and over)
20.0 2. Companionship
46.7 3. Worry-free travel
33.3 4. Community spirit
53.3 5. Independence maintained
13.3 6. Gained money from previous home sale
53.3 7. With similar people
53.3 8. Suitable lifestyle
13.3 9. Force by family to purchase
46.7 10. More leisure time
40.0 11. Living costs reduced
60.0 12. Affordable
40.0 13. Pride of ownership
86.7 14. Good resale value
60.0 15. Safety/physical security
80.0 16. Attractive complex
46.7 17. Nothing else like Parkvale was available
60.0 18. A new place
93.3 19. Convenient location
26.7 20. No outdoor maintenance
N/A 21. Recreation building
6.7 22. Social activities
0 23. Country atmosphere
46.7 24. Several floor plans/options available
86.7 25. Good size
86.7 26. Easy to housekeep
13.3 27. Special design features for seniors
46.7 28. No children
6.7 29. Recreational vehicle storage
0 30. Other (please specify: _____)

8 b) From the ABOVE list, which were the 5 MOST IMPORTANT REASONS for BUYING a PARKVALE DOWNS UNIT? (please use the number listed in front of the reason)

17 was the most important reason
tie # 1,25 was the 2nd most important reason
____ was the 3rd most important reason
3,5,12,16,17, # tie was the 4th most important reason
18,26 # ____ was the 5th most important reason

using multiple response analysis

YOUR LEVEL OF SATISFACTION

9. Please indicate your SATISFACTION with the following aspects of PARKVALE. (check [✓] a box for EACH aspect)

MEAN	STANDARD DEVIATION	LOCATION (x = min., max.)	1= Very Satisfied	2= Somewhat Satisfied	3 = Not Satisfied	Was Not Offered
1.5	0.7	Distance to transit stop	☒=7	☐=5	☐=1	☐
1.6	0.7	Distance to place of worship (n)	☒=6	☐=5	☒=1	☐
1.2	0.4	Distance to health services	☒=11	☒=2	☐	☐
1.2	0.4	Distance to shopping/services	☒=11	☐=3	☐	☐
1.3	0.5	Distance to family/friends	☒=9	☐=3	☐	☐
1.1	0.5	Distance to parks/lake	☒=13	☐=0	☐=1	☐
1.2	0.4	Quiet neighborhood	☒=12	☒=3	☐	☐

MEAN	STANDARD DEVIATION	LOI (x = min., max.)	1= Very Satisfied	2= Somewhat Satisfied	3= Not Satisfied	Was Not Offered
1.5	0.7	Privacy	☒=8	☐=5	☒=1	☐
1.5	0.7	Size (n)	☒=10	☐=3	☒=2	☐
1.8	0.6	View	☒=4	☐=10	☒=1	☐
1.6	0.7	Landscaping	☒=8	☐=5	☒=2	☐
1.3	0.6	Direction facing (for sun)	☒=11	☐=3	☒=1	☐
		EXTERIOR OF HOME				
1.7	0.8	Patio area	☒=8	☐=4	☒=3	☐
1.6	0.7	Attached garage (note: was detached)	☒=4	☐=3	☒=1	☐=5
1.7	0.7	Parking	☒=6	☐=6	☒=2	☐
N/A	N/A	No steps	☐	☐	☐	☐
2.3	0.9	Maintenance (snow removal, etc.)	☒=2	☐=2	☒=5	☐=3
1.9	0.7	Covered entrance	☒=2	☐=4	☒=1	☐=5
1.8	0.7	Type of windows	☒=5	☐=7	☒=2	☐
		INTERIOR OF HOME				
1.4	0.6	Efficient floor plan	☒=9	☒=6	☐	☐
1.5	0.6	Good use of space	☒=8	☐=6	☒=1	☐
1.3	0.5	Full basement	☒=10	☒=4	☐	☐
1.5	0.8	Single level (bungalow)	☒=5	☐=2	☒=1	☐=1
2.0	1.0	Sun room	☒=1	☐=1	☒=1	☐=6
1.8	0.8	Few stairs	☒=4	☐=3	☒=2	☐
1.3	0.5	Convenient kitchen	☒=10	☒=4	☐	☐
1.4	0.6	Kitchen cupboards	☒=10	☐=4	☒=1	☐
1.6	0.7	Laundry area	☒=7	☐=5	☒=2	☐
1.5	0.6	Storage	☒=8	☐=6	☒=1	☐
1.7	0.8	Lighting	☒=8	☐=4	☒=3	☐
1.4	0.5	Electrical outlet convenience	☒=9	☒=5	☐	☐
N/A		Lever-type door handles	☐	☐	☐	☐=8
N/A		Lever-type faucets	☐	☐	☐	☐=7
N/A		Bathroom safety bars	☐	☐	☐	☐=9
1.9	0.8	Flooring	☒=6	☐=5	☒=3	☐
		OPTIONAL FEATURES				
1.5	0.5	Fireplace	☒=6	☒=7	☐	☐
N/A		Whirlpool	☐	☐	☐	☐=11
N/A		Air conditioning	☐	☐	☐	☐=11
N/A		Emergency call button	☐	☐	☐	☐=11
N/A		Alarm system	☐	☐	☐	☐=7
2.0	1.4	Wheelchair access	☒=1	☐	☒=1	☐=9

MEAN	STANDARD DEVIATION	AMENITIES	1= Very Satisfied	2=Somewhat Satisfied	3= Not Satisfied	Was Not Offered
1.1	0.4	Recreation facilities	☒=7	☒=1	☐	☐=5
1.2	0.4	Open outdoor spaces	☒=8	☒=2	☐	☐=3
1.6	0.5	Social activities	☒=3	☒=4	☐	☐=6
		MANAGEMENT				
1.9	0.7	Owner's association	☒=2	☐=4	☒=1	☐=6
2.0	0.6	Involvement opportunities	☒=1	☐=4	☒=1	☐=5
N/A		Condominium fees	☐	☐	☐	☐=8
1.7	0.5	General restrictions	☒=2	☒=5	☐	☐=4
1.6	0.5	Resale restrictions	☒=2	☒=3	☐	☐=5
2.5	0.7	Management effectiveness	☐	☒=.	☒=1	☐=8

10. Would you RECOMMEND a **PARKVALE DOWNS** complex to friends? (check one)

n=15

%	
60.0	☐ I definitely would
20.0	☐ I probably would
13.3	☐ I do not know
6.7	☐ I probably would not
0	☐ I definitely would not

11. If you had the **OPTION OF MAKING THE CHOICE OVER AGAIN**, would you buy a **PARKVALE DOWNS UNIT?**

n=15

%	
66.7	☐ Yes
13.3	☐ Maybe, I do not really know
20.0	☐ No (please indicate why not: _____)

12. If you were a **DEVELOPER/BUILDER**, what would you **CHANGE** in another retirement village development? (This may include ideas about the complex, the units, and the management)

_____

_____

_____

_____

GENERAL

13. **WHICH** of the following statements would **BEST DESCRIBE YOUR INVOLVEMENT** in the development of your **PARKVALE DOWNS COMPLEX**? (check one)

n=14

%	
80.0	☐ Able to choose only the interior features/options of my unit
13.3	☐ Had a say in my unit's interior features and in the (amenities building) N/A
0	☐ Was asked for input on several things, including the overall complex design, the amenities to be offered, and the units
0	☐ Had no say at all

14. How has your **LIFESTYLE** (the way you live) **CHANGED** since moving to **PARKVALE** ? (check all thay apply)

	%	Level of Activity		
		Less	Same	More
Social activity n=13		☐ 7.7	☐ 46.2	☐ 46.2
Physical activity n=14		☐ 7.1	☐ 42.9	☐ 50.0
Leisure time n=14		☐ 7.1	☐ 28.6	☐ 64.3
Travel n=12		☐ 26.7	☐ 20.0	☐ 33.3
Extra spending money n=10		☐ 10.0	☐ 50.0	☐ 40.0
Other (specify: ——)		☐	☐	☐

15. Which of the following **SUPPORT SERVICES** would you **LIKE** to have available to **PARKVALE DOWNS RESIDENTS** when the need arises?

%

13.3 ☐ On-site medical clinic
6.7 ☐ 24 hour nurse
20.0 ☐ Emergency call buttons or systems
6.7 ☐ Meal service
13.3 ☐ Wheelchair access
13.3 ☐ Resident van and driver
6.7 ☐ On-site pharmacy service
20.0 ☐ Housekeeping/home help services
20.0 ☐ Personal help services
40.0 ☐ None of the above, will arrange on own

YOUR PREVIOUS HOME

16. What **TYPE OF RESIDENCE** did you live in **BEFORE** moving to Parkvale Downs?

n=15

%
90.0 ☐ House
13.3 ☐ Apartment or duplex
6.7 ☐ Condominium
0 ☐ Other

17. Was your **PREVIOUS HOME** in **Red Deer?**

n=15

%
66.7 ☐ Yes
33.3 ☐ No ——— 20.0 ☐ Another city (specify: _____)
13.3 ☐ Rural area (specify: _____)

18. **HOW LONG** did you live in your **PREVIOUS** home?

n=15

%
33.3 ☐ Less than 5 years
40.0 ☐ 6 - 10 years
6.7 ☐ 11 - 20 years
20.0 ☐ More than 20 years

19. Did you **RENT** or **OWN** your **PREVIOUS** home?

n=15

%	
80.0	☐ Own (please go to question 20)
20.0	☐ Rent (please go to question 21)

20. Which of the following **BEST** indicates the amount of **MORTGAGE** which was remaining on your **PREVIOUS** home?

n=11

%	
90.9	☐ Clear title/no mortgage
0	☐ Less than $10,000
0	☐ $10,000 - $19,999
9.1	☐ $20,000 - $29,999
0	☐ $30,000 - $39,999
0	☐ $40,000 or more

YOUR PARKVALE HOME

21. When you **PURCHASED** a unit in **PARKVALE DOWNS** did you:

n=13

%	
84.6	☐ Sell you previous home?
7.7	☐ Rent out your previous home?
7.7	☐ Other? (please explain: _____)

22. Is the amount you **PAID** for your **PARKVALE UNIT**:

n=13

%	
23.1	☐ Less than the value of your previous home?
30.8	☐ More than the value of your previous home?
46.1	☐ About the same value as your previous home?

23. When you **PURCHASED A UNIT** in **PARKVALE**, did you:

n=13

%	
30.8	☐ Take out a mortgage or loan?
69.2	☐ Obtain clear title _____ (please go to question 25)

24. Which best indicates your **PRESENT MORTGAGE** or **LOAN**?

n=3

%	
0	☐ Less than $10,000
0	☐ $10,000 - $19,999
0	☐ $20,000 - $29,999
0	☐ $30,000 - $39,999
100.0	☐ $40,000 or more

25. Is your **PARKVALE DOWNS** unit:

%	
46.7	☐ Smaller than your previous home?
20.0	☐ Larger than your previous home?
33.3	☐ About the same size as your previous home?

n=15

26. What is the approximate **SIZE** of your **PARKVALE DOWNS** home?

%	
13.3	☐ Less than 1,000 square feet
80.0	☐ 1,000 - 1,499 square feet
6.7	☐ 1,500 - 2,000 square feet
0	☐ More than 2,000 square feet

n=15

27. Do you expect your move to **PARKVALE DOWNS** to be your **FINAL MOVE**?

%	
60.0	☐ Yes
20.0	☐ No
20.0	☐ Do not know/ have not thought about it

n=15

28. What would cause you to **MOVE** from Parkvale Downs? (you may check more than one item)

%	
66.7	☐ Severe health problems
26.7	☐ Financial issues
0	☐ Stay close to family who move
33.3	☐ To live in a milder climate
13.3	☐ Other (please specify: _____)

n=15

THE PEOPLE IN YOUR HOME

29. MARITAL STATE?

%					
60.0	☐ Married	☐ Single	0	☐ Other	0
6.7	☐ Divorced/Separated	☐ Widowed	33.3		

n=15

IT IS IMPORTANT THAT ALL RESIDENTS OF HORIZON VILLAGE BE INCLUDED IN THE STUDY RESULTS. FOR COUPLES, PLEASE AMSWER FOR BOTH THE MALE AND FEMALE MEMBER OF THE HOUSEHOLD. IF ONLY ONE PERSON LIVES IN THE HOME, PLEASE CHECK ONLY THE APPROPRIATE COLUMN.

30. AGE?

	n=13 FEMALE	n=8 MALE
Less than 50 years	30.8 ☐	☐ 12.5
50 - 55 years	23.1 ☐	☐ 25.0
56 - 60 years	7.7 ☐	☐ 0
61 - 65 years	15.4 ☐	☐ 25.0
66 - 70 years	7.7 ☐	☐ 0
71 - 75 years	15.4 ☐	☐ 37.5
76 - 80 years	0 ☐	☐ 0
Over 80 years	0 ☐	☐ 0

31. What is the highest level of **EDUCATION** achieved?

	%	n=13 FEMALE	n=8 MALE
High school or less		53.8 ☐	☐ 62.5
College or technical school		15.4 ☐	☐ 25.0
University		30.8 ☐	☐ 12.5

32. Current **EMPLOYMENT** ?

	%	n=14 FEMALE	n=9 MALE
Full time		28.6 ☐	☐ 44.4
Part time		14.3 ☐	☐ 0
Self employed/owner		0 ☐	☐ 0
Retired		50.0 ☐	☐ 55.6
Not employed		7.1 ☐	☐ 0

33. **PRIMARY** lifetime **OCCUPATION** ?

	n=13 FEMALE	n=8 MALE
Homemaker	38.5 ☐	☐ 0
Managerial	7.7 ☐	☐ 37.5
Professional	30.8 ☐	☐ 12.5
Technical	7.7 ☐	☐ 12.5
Clerical	0 ☐	☐ 12.5
Office	7.7 ☐	☐ 0
Sales	7.7 ☐	☐ 12.5
Skilled	0 ☐	☐ 0
Unskilled	0 ☐	☐ 0
Farming	0 ☐	☐ 12.5
Other (specify: _____)	0 ☐	☐ 0

34. Other than Canadian, what is your **ETHNIC BACKGROUND** ?

	n=12 FEMALE	n=7 MALE
German	25.0 ☐	☐ 28.6
Ukrainian	0 ☐	☐ 0
Polish	0 ☐	☐ 0
Italian	0 ☐	☐ 0
Greek	0 ☐	☐ 0
Portuguese	0 ☐	☐ 0
Irish	8.3 ☐	☐ 0
English	41.7 ☐	☐ 42.9
Scottish	16.7 ☐	☐ 14.3
Dutch	0 ☐	☐ 0
Chinese	0 ☐	☐ 0
Other (specify: _____)	8.3 ☐	☐ 14.3

35. How would you describe you and your spouse's present HEALTH ?

	%	n=14 FEMALE	n=8 MALE
Excellent	35.7	☐	☐ 37.5
Satisfactory	57.1	☐	☐ 50.0
Poor	7.1	☐	☐ 12.5

36. Did you TRAVEL outside Alberta during the last year?

n=15

%	
86.7	☐ Yes
13.3	☐ No _____ → Please go to question 39.

37. If you TRAVELLED outside Alberta, did you: (you may check more than one)

n=13

%			
15.4	☐ Travel during the summer?	— ☐ Travel during the fall?	23.1 two seasons only
30.8	☐ Travel during the winter?	— ☐ Travel during the spring?	23.1 three seasons 7.7 all seasons

38. If you TRAVELLED outside Alberta, HOW LONG (in total) were you away?

n=13

%	
46.2	☐ Less than one month
38.5	☐ 1 - 2 months
7.7	☐ 3 - 4 months
7.7	☐ 5 - 6 months
0	☐ More than 6 months

39. How many VEHICLES do you own?

n=15

%	
0	☐ None
60.0	☐ One
33.3	☐ Two
6.7	☐ Three or more

40. Which of the following groups best describes your TOTAL HOUSEHOLD INCOME AND EARNINGS (before taxes) for 1986?

n=12

%	
16.7	☐ Under $20,000
25.0	☐ $20,000 - $29,999
0	☐ $30,000 - $39,999
33.3	☐ $40,000 - $49,999
8.3	☐ $50,000 - $59,999
0	☐ $60,000 - $69,999
16.7	☐ $70,000 and over

41. Please indicate WHO ANSWERED this survey questionnaire.

n=15

%	
53.3	☐ FEMALE HEAD OF HOUSEHOLD
20.0	☐ MALE HEAD OF HOUSEHOLD
26.7	☐ BOTH

42. **Before you purchased a unit in Parkvale Downs, did you look at a unit in Parkvale Estates? If yes, why didn't you purchase there? If no, please explain your answer.**

Half the respondents looked at plans for Parkvale Estates. The following comments were made: (quoted)

- Weren't built
- Prefer close to downtown area
- Parkvale Estates very nice & built for wheelchairs etc. but were all sold.
- No. Was not aware of Parkvale Estates. Time limit when decision was made.
- Yes. None available. Also see a better long term resale value in Parkvale Downs and preferred the plan and size of unit.
- No. They weren't started yet.
- No. They weren't built & plans were not complete.
- All sold by time we looked. Also no basement, and cement floors.
- More senior accommodation. Slab on grade undesirable.
- Too small
- No. I'm too young! (50-55 category)
- No. I was not interested.

n=26

NON-BUYER SURVEY

NON-BUYER (PARKVALE DOWNS) RESULTS

YOUR INTEREST IN MOVING

1 a). Please check [✓] **ALL** the **REASONS** why you would **MOVE** from your **PRESENT HOME.**

%		
0	1.	Present home too small
30.8	2.	Present home too large
80.8	3.	Too much outdoor maintenance
11.5	4.	Home needed major repairs
7.7	5.	Neighborhood unsafe
38.5	6.	Too many stairs
42.3	7.	No main floor laundry facilities
7.7	8.	Not close to community services (shopping, health care, etc.)
7.7	9.	Not close to public transportation
7.7	10.	Home difficult to look after
7.7	11.	Financial reasons
3.8	12.	Home too costly
19.2	13.	Death of spouse
19.2	14.	Loneliness
23.1	15.	Health reasons
3.8	16.	Need for more privacy
19.2	17.	Wish to be with mature age group
11.5	18.	Family encouraged the move
3.8	19.	To be near family/friends
11.5	20.	Other (please specify: _____)

1 b). From the **ABOVE** list, which would be the **MOST IMPORTANT REASONS** for moving? (please use the number listed in front of the reason)

using multiple response analysis

- # 3 was the most important reason
- # 7 was the 2nd most important reason
- # 6 was the 3rd most important reason
- # 2 was the 4th most important reason

tie # 13, 15 was the 5th most important reason

2. Which of the following **TYPES OF HOUSING** would you seriously **CONSIDER** before moving ? (check [✓] all that apply) [**Note**: apartments and condominiums are **non-subsidized**]

%	
53.8	☐ To remain where you were
34.6	☐ A house
3.8	☐ A high rise apartment
15.4	☐ A high rise apartment for seniors
19.2	☐ A low rise apartment
38.5	☐ A low rise apartment for seniors
3.8	☐ A high rise condominium
7.7	☐ A high rise condominium for seniors
3.8	☐ A nursing home
3.8	☐ A lodge
7.7	☐ Shared housing (among own age group)
0	☐ Live in children's home

3. How did you **FIRST HEAR ABOUT PARKVALE DOWNS?** (check [✓] one)

n=26

%	
3.8	☐ Television
0	☐ Radio
69.2	☐ Advertisement in a newspaper
0	☐ Advertisement in a magazine
23.1	☐ Family or friends
3.8	☐ Drove by and saw the sales office
0	☐ Other (please specify: _____)

4 a). When you were **THINKING** about a **PARKVALE DOWNS** unit, **HOW IMPORTANT** were **EACH** of the following factors? (check [✓] one box for each item)

MEAN	STANDARD DEVIATION		X = max., min.	1= Very Important	2= Important	3= Unimportant	4=Very Unimportant	Do Not Know
1.5	0.6	1.	Initial cost	☒=12	☐=8	☒=1	☐=0	☐=2
1.9	0.6	2.	On-going cost/monthly costs	☒=4	☐=12	☒=2	☐=0	☐=3
3.1	0.7	3.	Close to current neighborhood	☒=1	☐=1	☐=13	☒=5	☐=1
2.8	0.8	4.	Close to family/friends	☒=2	☐=5	☐=12	☒=3	☐=1
2.3	0.7	5.	Close to public transportation	☒=2	☐=11	☐=0	☒=7	☐=1
2.4	0.9	6.	Social activities	☒=3	☐=8	☐=7	☒=2	☐=2
2.3	0.9	7.	Recreational activities	☒=4	☐=7	☐=9	☒=1	☐=1
1.9	0.8	8.	Restricted to age 50 and over	☒=6	☐=12	☐=2	☒=1	☐=2
1.5	0.6	9.	Safety/security features	☒=11	☐=10	☒=1	☐=0	☐=1
1.6	0.7	10.	Design of individual unit	☒=11	☐=7	☒=2	☐=0	☐=2
1.5	0.5	11.	Parking	☒=11	☒=11	☐=0	☐=0	☐=1
1.8	0.7	12.	Appearance of the buildings	☒=8	☐=10	☒=3	☐=0	☐=2
1.4	0.6	13.	Maintenance free exteriors (snow removal, grass cutting, etc.)	☒=14	☐=8	☒=1	☐=0	☐=1
2.3	0.8	14.	Close to health services	☒=4	☐=8	☐=8	☒=1	☐=1
2.1	0.7	15.	Close to shopping	☒=4	☐=11	☒=7	☐=0	☐=1
2.1	1.0	16.	Opportunity for ownership	☒=6	☐=9	☐=3	☒=3	☐=2
2.3	0.9	17.	Purchasing in a new complex	☒=4	☐=8	☐=6	☒=2	☐=2
1.7	0.7	18.	Resale value	☒=8	☐=10	☒=2	☐=0	☐=3
2.0	1.1	19.	No children allowed	☒=7	☐=8	☐=1	☒=3	☐=2
1.4	0.5	20.	Quality of construction	☒=13	☒=8	☐=0	☐=0	☐=2

4 b). From the **ABOVE** list, which were the **5 MOST IMPORTANT FACTORS?** (please use the number listed in front of the reason)

- # 1 was the most important reason
- # 13 was the 2nd most important reason
- # 10 was the 3rd most important reason
- # 2 was the 4th most important reason
- # 20 was the 5th most important reason

using multiple response analysis

5. When you were **CONSIDERING** a new home **HOW IMPORTANT** were the following **HOME FEATURES** to you? (please check [✓] a box for **EACH** feature)

MEAN	STANDARD DEVIATION	x = max, min	1= Very Important	2= Important	3= Unimportant	4= Very Unimportant
		LOCATION				
2.1	0.9	Distance to transit stop	☒=7	☐=7	☐=8	☒=1
2.3	0.8	Distance to place of worship (n)	☒=4	☐=8	☐=10	☒=1
2.3	0.8	Distance to health services	☒=3	☐=9	☐=8	☒=1
2.1	0.9	Distance to shopping/services	☒=6	☐=10	☐=7	☒=1
2.5	0.8	Distance to family/friends	☒=3	☐=7	☐=12	☒=1
2.5	0.9	Distance to parks/lake	☒=4	☐=6	☐=11	☒=2
1.6	0.8	Quiet neighborhood	☒=12	☐=11	☐=1	☒=1
		LOT				
1.6	0.5	Privacy	☒=10	☒=15	☐	☐
1.7	0.6	Size	☒=8	☐=13	☒=2	☐
1.7	0.6	View	☒=9	☐=13	☒=1	☐
1.6	0.5	Landscaping	☒=10	☒=14	☐	☐
1.7	0.6	Direction facing (for sun)	☒=10	☐=11	☒=2	☐
		EXTERIOR OF HOME				
2.0	0.7	Patio area	☒=4	☐=15	☐=3	☒=1.
1.2	0.4	Attached garage	☒=18	☒=5	☐	☐
1.4	0.6	Parking	☒=14	☐=8	☒=1	☐
1.7	0.7	No steps	☒=11	☐=10	☒=4	☐
1.5	0.5	Low maintenance (snow removal, etc.)	☒=13	☒=11	☐	☐
1.6	0.7	Covered entrance	☒=10	☐=10	☒=2	☐
1.6	0.7	Type of windows	☒=11	☐=9	☒=2	☐
		INTERIOR OF HOME				
1.3	0.4	Efficient floor plan	☒=18	☒=16	☐	☐
1.3	0.5	Good use of space	☒=16	☒=6	☐	☐
2.1	1.1	Full basement	☒=8	☐=7	☐=5	☒=3
1.5	0.7	Single level (bungalow)	☒=14	☐=8	☒=2	☐
2.4	0.8	Sun room	☒=2	☐=9	☐=6	☒=2
1.7	0.7	Few stairs	☒=10	☐=10	☒=3	☐
1.4	0.5	Convenient kitchen	☒=14	☒=8	☐	☐
1.3	0.5	Kitchen cupboards	☒=17	☒=6	☐	☐
1.5	0.5	Laundry area	☒=12	☒=12	☐	☐
1.4	0.5	Storage	☒=13	☒=10	☐	☐
1.6	0.5	Lighting	☒=10	☒=13	☐	☐
1.4	0.5	Electrical outlet convenience	☒=14	☒=9	☐	☐
2.5	0.7	Lever-type door handles	☒=2	☐=9	☐=10	☒=1
2.3	0.9	Lever-type faucets	☒=5	☐=7	☐=9	☒=1
2.2	1.0	Bathroom safety bars	☒=7	☐=8	☐=6	☒=3
1.5	0.5	Flooring	☒=11	☒=12	☐	☐

MEAN	STANDARD DEVIATION	OPTIONAL FEATURES	1=Very Important	2=Important	3=Unimportant	4=Very Unimportant
2.7	1.0	Fireplace	☒=4	☐=2	☐=13	☒=4
2.8	0.9	Whirlpool	☒=2	☐=4	☐=11	☒=5
2.3	0.8	Air conditioning	☒=3	☐=11	☐=7	☒=1
2.4	0.8	Emergency call button	☒=3	☐=9	☐=9	☒=1
2.0	0.8	Alarm system	☒=6	☐=12	☐=4	☒=1
2.7	0.9	Wheelchair access	☒=3	☐=4	☐=11	☒=3
		AMENITIES				
2.6	0.9	Near recreation facilities	☒=2	☐=10	☐=7	☒=4
2.4	1.0	Near social activities	☒=4	☐=11	☐=5	☒=4

YOUR DECISION NOT TO BUY IN PARKVALE DOWNS

6 a). Please check [✓] ALL your REASONS for NOT BUYING a **PARKVALE DOWNS** unit.

%		
34.6	1.	Like Parkvale Downs but not ready to move yet
3.8	2.	Not a good location
11.5	3.	Would prefer to rent
19.2	4.	Would prefer a single detached house
7.7	5.	Do not want to live in a mature adult community (age 50 and over)
7.7	6.	Not enough privacy
30.8	7.	Too expensive (initial cost)
11.5	8.	Ongoing/monthly costs too high
3.8	9.	Not a suitable lifestyle
3.8	10.	Forced by family not to purchase
15.4	11.	Not good resale value
3.8	12.	Not an attractive complex
19.2	13.	Units too crowded together
0	14.	New, prefer something more established
11.5	15.	No outdoor gardening
11.5	16.	No suitable floor plans/options available
11.5	17.	Our choice sold out
34.6	18.	Too small
0	19.	Too large
7.7	20.	No special design features for seniors
11.5	21.	Too many restrictions in Parkvale
3.8	22.	Quality of construction
19.2	23.	Other (please specify: _____)

6 b) From the **ABOVE** list, which were the **5 MOST IMPORTANT REASONS** for **NOT BUYING** a **PARKVALE DOWNS UNIT?** (please use the number listed in front of the reason)

tie
- # 1 was the most important reason
- # 7, 18 was the 2nd most important reason
- # ____ was the 3rd most important reason
- # 4 was the 4th most important reason
- # 13 was the 5th most important reason

using multiple response analysis

7. When **CONSIDERING** the purchase of a **PARKVALE DOWNS** UNIT, who had the MOST INFLUENCE on your decision not to buy? (check [✓] one)

n=19

%	
100.	☐ No one, I/we made the decision alone
0	☐ Brother or sister
0	☐ Adult child
0	☐ Parent
0	☐ Other relative
0	☐ Friend
0	☐ Salesperson
0	☐ Other (please specify: _____)

8. How long have you been **LOOKING** for a new home?

n=8

%	
12.5	☐ 1 - 4 weeks
0	☐ 1 - 5 months
12.5	☐ 6 - 12 months
50.0	☐ 1 - 2 years
12.5	☐ 2 - 3 years
12.5	☐ more than 3 years

9. If you were a **DEVELOPER/BUILDER**, what would you **CHANGE** in another retirement village development so that your decision to buy might change? (This may include ideas about the complex, the units, and the management)

NOT CODED

YOUR PRESENT HOME

10. What **TYPE OF RESIDENCE** do you live in?

n=26

%	
76.9	☐ House
15.4	☐ Apartment or duplex
3.8	☐ Condominium
3.8	☐ Other

11. Do you **LIVE** in:

%		
96.2	☐	Red Deer? _____ ≥ Which area? _____
3.8	☐	Another city (specify: _____)
	☐	Rural area (specify: _____)
	☐	Other (specify: _____)

n=26

12. **HOW LONG** have you lived in your **PRESENT** home?

%		
15.4	☐	Less than 5 years
34.6	☐	6 - 10 years
23.1	☐	11 - 20 years
26.9	☐	More than 20 years

n=26

13. How long do you intend to **LIVE** in your present home?

more than 2 years 60.9%

don't know 17.4% other 21.7%

n=23

14. What is the approximate **SIZE** of your **PRESENT** home?

19.2	☐	Less than 1,000 square feet
69.2	☐	1,000 - 1,499 square feet
11.5	☐	1,500 - 2,000 square feet
0	☐	More than 2,000 square feet

n=26

15. Do you **RENT** or **OWN** your **PRESENT** home?

92.3	☐	Own _____ ≥ (please go to question 16)
7.7	☐	Rent _____ ≥ (please go to question 17)

n=26

16. Which of the following **BEST** indicates the amount of **MORTGAGE** which is remaining on your **PRESENT** home?

%		
75.0	☐	Clear title/no mortgage
0	☐	Less than $10,000
0	☐	$10,000 - $19,999
4.2	☐	$20,000 - $29,999
4.2	☐	$30,000 - $39,999
16.7	☐	$40,000 or more

n=24

THE PEOPLE IN YOUR HOME

17. MARITAL STATE?

69.2	☐	Married	7.7	☐	Divorced/Separated
0	☐	Single	11.5	☐	Widowed
11.5	☐	Other			

n=26

IT IS IMPORTANT THAT tTHE STUDY INCLUDE ALL HEAD MEMBERS OF THE HOUSEHOLD. FOR COUPLES, PLEASE ANSWER FOR BOTH THE MALE AND FEMALE MEMBER OF THE HOUSEHOLD. IF ONLY ONE PERSON LIVES IN THE HOME, PLEASE CHECK [✓] ONLY THE APPROPRIATE COLUMN.

18. AGE?

	n=26 FEMALE	n=20 MALE
Less than 50 years	11.5 ☐	☐ 5.0
50 - 55 years	7.7 ☐	☐ 5.0
56 - 60 years	15.4 ☐	☐ 20.0
61 - 65 years	26.9 ☐	☐ 20.0
66 - 70 years	23.1 ☐	☐ 15.0
71 - 75 years	7.7 ☐	☐ 20.0
76 - 80 years	7.7 ☐	☐ 15.0
Over 80 years	0 ☐	☐ 0

19. What is the highest level of **EDUCATION** achieved?

	n=26 FEMALE	n=20 MALE
High school or less	73.1 ☐	☐ 65.0
College or technical school	15.4 ☐	☐ 30.0
University	11.5 ☐	☐ 5.0

20. Current **EMPLOYMENT** ?

	n=26 FEMALE	n=20 MALE
Full time	11.5 ☐	☐ 30.0
Part time	11.5 ☐	☐ 10.0
Self employed/owner	3.8 ☐	☐ 0
Retired	61.5 ☐	☐ 55.0
Not employed	11.5 ☐	☐ 5.0

21. **PRIMARY** lifetime **OCCUPATION** ?

	n=26 FEMALE	n=19 MALE
Homemaker	46.2 ☐	☐ 0
Managerial	3.8 ☐	☐ 47.4
Professional	15.4 ☐	☐ 10.5
Technical	0 ☐	☐ 5.3
Clerical	19.2 ☐	☐ 5.3
Office	3.8 ☐	☐ 5.3
Sales	7.7 ☐	☐ 10.5
Skilled	3.8 ☐	☐ 15.8
Unskilled	0 ☐	☐ 0
Farming	0 ☐	☐ 0
Other (specify: _____ 0) ☐		☐ 0

22. Other than Canadian, what is your **ETHNIC BACKGROUND** ?

	n=22 FEMALE	n=16 MALE
German	13.6 ☐	☐ 18.8
Ukrainian	9.1 ☐	☐ 0
Polish	0 ☐	☐ 0
Italian	0 ☐	☐ 0
Greek	0 ☐	☐ 0
Portuguese	0 ☐	☐ 0
Irish	18.2 ☐	☐ 25.0
English	18.2 ☐	☐ 25.0
Scottish	27.3 ☐	☐ 18.8
Dutch	4.5 ☐	☐ 6.3
Chinese	0 ☐	☐ 0
Other (specify: _____)	9.1 ☐	☐ 6.3

23. How would you describe you and your spouse's present **HEALTH** ?

	n=26 FEMALE	n=20 MALE
Excellent	38.5 ☐	☐ 25.0
Satisfactory	61.5 ☐	☐ 75.0
Poor	0 ☐	☐ 0

24. Did you **TRAVEL** outside Alberta during the last year?

n=26

84.6 ☐ Yes
15.4 ☐ No _____ → Please go to question 27

25. If you **TRAVELLED** outside Alberta, did you: (you may check more than one)

n=22

31.8 ☐ Travel during the summer? 13.6 ☐ Travel during the fall? two seasons
– ☐ Travel during the winter? – ☐ Travel during the spring 9.1 three seasons

26. If you **TRAVELLED** outside Alberta, **HOW LONG** (in total) were you away?

n=22

81.8 ☐ Less than one month
18.2 ☐ 1 - 2 months
0 ☐ 3 - 4 months
0 ☐ 5 - 6 months
0 ☐ More than 6 months

27. How many **VEHICLES** do you own?

n=26

0 ☐ None
61.5 ☐ One
30.8 ☐ Two
7.7 ☐ Three or more

28. Which of the following groups best describes your **TOTAL HOUSEHOLD INCOME AND EARNINGS** (before taxes) for 1986?

20.0 ☐ Under $20,000
28.0 ☐ $20,000 - $29,999
28.0 ☐ $30,000 - $39,999
n=25 4.0 ☐ $40,000 - $49,999
16.0 ☐ $50,000 - $59,999
4.0 ☐ $60,000 - $69,999
0 ☐ $70,000 and over

29. Please indicate who **ANSWERED** this survey questionnaire.

30.8 ☐ FEMALE HEAD OF HOUSEHOLD
n=26 23.1 ☐ MALE HEAD OF HOUSEHOLD
46.2 ☐ BOTH

THANK YOU FOR YOUR TIME AND COOPERATION!

PLEASE RETURN YOUR SURVEY IN THE STAMPED ENVELOP PROVIDED AT YOUR EARLIEST CONVENIENCE

Your name will be held in the STRICTEST PROFESSIONAL CONFIDENCE.

For Office Use Only
☐☐

APPENDIX B

TABLES

13 NOV 87 HORIZON PARKVALE COMPARISON PAGE 43
19:35:50 University of Alberta

CROSSTABULATION OF
LOCATION Development location BY HEAR hear about Horizon Village PAGE 1 OF 1

LOCATION	COUNT / ROW PCT / COL PCT / TOT PCT	HEAR TV 1	radio 2	news ads 3	mag ads 4	fam/frie nds 5	drove by 6	info tre 7	Can other 8	ROW TOTAL
Horizon	1	7	4	17	8	10	1	1	3	51
		13.7	7.8	33.3	15.7	19.6	2.0	2.0	5.9	60.0
		77.8	100.0	60.7	100.0	38.5	33.3	50.0	60.0	
		8.2	4.7	20.0	9.4	11.8	1.2	1.2	3.5	
Parkvale	2	2		11		16	2	1	2	34
		5.8		32.4		47.1	5.9	2.9	5.9	40.0
		22.2		39.3		61.5	66.7	50.0	40.0	
		2.4		12.9		18.8	2.4	1.2	2.4	
	COLUMN TOTAL	9	4	28	8	26	3	2	5	85
		10.6	4.7	32.9	9.4	30.6	3.5	2.4	5.9	100.0

CHI-SQUARE	D F	SIGNIFICANCE	MIN E F	CELLS WITH E F < 5
15.18900	7	0.0327	0.800	11 OF 16 (68.8%)

NUMBER OF MISSING OBSERVATIONS = 28

$p = .5$

2 NOV 87 PARKVALE STUDY
22:38:11 University of Alberta

CROSSTABULATION OF
LOCATION Development location BY HOWLONG How long in previous/present home PAGE 1 OF 1

LOCATION	COUNT / ROW PCT / COL PCT / TOT PCT	HOWLONG <5yrs 1	6-10yrs 2	11-20yrs 3	>20yrs 4	ROW TOTAL
Estates	4	2	3	3	14	22
		9.1	13.6	13.6	63.6	59.5
		28.6	33.3	75.0	82.4	
		5.4	8.1	8.1	37.8	
Downs	5	5	6	1	3	15
		33.3	40.0	6.7	20.0	40.5
		71.4	66.7	25.0	17.6	
		13.5	16.2	2.7	8.1	
	COLUMN TOTAL	7	9	4	17	37
		18.9	24.3	10.8	45.9	100.0

CHI-SQUARE	D F	SIGNIFICANCE	MIN E F	CELLS WITH E F < 5
9.41606	3	0.0242	1.622	5 OF 8 (62.5%)

NUMBER OF MISSING OBSERVATIONS = 0

- - - -

- - - -

T-TEST

GROUP 1 - GROUP EQ 1.00 → Parkvale Buyers
GROUP 2 - GROUP EQ 2.00 → " Non-buyers

VARIABLE	NUMBER OF CASES	MEAN	STANDARD DEVIATION	STANDARD ERROR	F VALUE	2-TAIL PROB	POOLED VARIANCE ESTIMATE T VALUE	DEGREES OF FREEDOM	2-TAIL PROB	SEPARATE VARIANCE ESTIMATE T VALUE	DEGREES OF FREEDOM	2-TAIL PROB
IMPEXT3 parking												
GROUP 1	29	1.7241	0.926	0.086	1.25	0.571	1.85	50	0.068	1.84	44.85	0.072
GROUP 2	23	1.4348	0.590	0.123								
IMPEXT4 no steps												
GROUP 1	35	1.8000	0.858	0.167	1.39	0.409	0.37	58	0.710	0.38	58.19	0.702
GROUP 2	25	1.7200	0.737	0.147								
IMPEXT5 low maintenance												
GROUP 1	35	1.7143	0.756	0.133	2.49	0.031	1.40	57	0.167	1.51	55.55	0.135
GROUP 2	24	1.4583	0.508	0.104								
IMPEXT6 covered entrance												
GROUP 1	27	2.2593	0.855	0.126	1.01	0.976	3.30	47	0.002	3.30	44.87	0.002
GROUP 2	22	1.6364	0.658	0.140								
IMPEXT7 window type												
GROUP 1	35	1.8286	0.568	0.096	1.36	0.388	1.44	55	0.155	1.39	39.48	0.173
GROUP 2	22	1.5909	0.665	0.142								
IMPINT1 efficient floor plan												
GROUP 1	35	1.3714	0.490	0.083	1.23	0.613	0.97	57	0.335	0.89	52.75	0.326
GROUP 2	24	1.2500	0.442	0.090								
IMPINT2 good use of space												
GROUP 1	36	1.4167	0.500	0.083	1.20	0.655	1.10	55	0.278	1.12	47.75	0.268
GROUP 2	22	1.2727	0.456	0.097								

T-TEST

GROUP 1 - GROUP EQ 1.00 Parkvale Buyers
GROUP 2 - GROUP EQ 2.00 Parkvale Non-buyers

VARIABLE	NUMBER OF CASES	MEAN	STANDARD DEVIATION	STANDARD ERROR	F VALUE	2-TAIL PROB	POOLED VARIANCE ESTIMATE T VALUE	DEGREES OF FREEDOM	2-TAIL PROB	SEPARATE VARIANCE ESTIMATE T VALUE	DEGREES OF FREEDOM	2-TAIL PROB
IMPINT3 full basement												
GROUP 1	27	2.8148	1.178	0.227	1.24	0.612	2.18	48	0.037	2.18	47.88	0.035
GROUP 2	23	2.1304	1.058	0.221								
IMPINT4 single level												
GROUP 1	38	1.8420	0.870	0.164	1.74	0.181	0.65	60	0.513	0.67	48.32	0.504
GROUP 2	24	1.6000	0.658	0.135								
IMPINT5 sun room												
GROUP 1	22	2.7273	0.855	0.210	1.38	0.482	1.06	39	0.294	1.05	35.00	0.28
GROUP 2	19	2.4211	0.838	0.182								
IMPINT6 few stairs												
GROUP 1	28	1.9615	0.899	0.188	2.02	0.100	1.08	47	0.283	1.09	44.85	0.28
GROUP 2	23	1.6957	0.703	0.147								
IMPINT7 convenient kitchen												
GROUP 1	38	1.5278	0.506	0.084	1.98	0.213	1.31	58	0.231	1.32	45.61	0.22
GROUP 2	22	1.3636	0.492	0.105								
IMPINT8 kitchen cupboards												
GROUP 1	35	1.4857	0.507	0.086	1.28	0.555	1.73	56	0.090	1.77	51.11	0.08
GROUP 2	23	1.2609	0.448	0.094								
IMPINT9 laundry area												
GROUP 1	38	1.5163	0.507	0.088	1.01	0.981	0.11	57	0.918	0.11	49.35	0.918
GROUP 2	24	1.5000	0.511	0.104								

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T - T E S T

GROUP 1 - GROUP EQ 1.00 Parkvale Buyers
GROUP 2 - GROUP EQ 2.00 Parkvale Non-buyers

VARIABLE	NUMBER OF CASES	MEAN	STANDARD DEVIATION	STANDARD ERROR	F VALUE	2-TAIL PROB	POOLED VARIANCE ESTIMATE T VALUE	POOLED VARIANCE ESTIMATE DEGREES OF FREEDOM	POOLED VARIANCE ESTIMATE 2-TAIL PROB	SEPARATE VARIANCE ESTIMATE T VALUE	SEPARATE VARIANCE ESTIMATE DEGREES OF FREEDOM	SEPARATE VARIANCE ESTIMATE 2-TAIL PROB
IMPOPT1 fireplace												
GROUP 1	30	2.8333	0.834	0.152	1.34	0.460	0.38	51	0.705	0.37	43.80	0.710
GROUP 2	23	2.7391	0.864	0.201								
IMPOPT2 whirlpool												
GROUP 1	31	3.2581	0.862	0.122	1.70	0.178	1.83	51	0.073	1.76	37.80	0.086
GROUP 2	22	2.8636	0.889	0.190								
IMPOPT3 air conditioning												
GROUP 1	30	3.0667	0.640	0.117	1.44	0.388	4.06	50	0.000	3.85	40.28	0.000
GROUP 2	22	2.2727	0.767	0.164								
IMPOPT4 emerg call button												
GROUP 1	26	3.0800	0.572	0.114	1.81	0.129	3.58	46	0.001	3.62	37.80	0.001
GROUP 2	22	2.3636	0.790	0.168								
IMPOPT5 alarm system												
GROUP 1	30	2.3667	0.844	0.172	1.40	0.418	1.09	51	0.282	1.11	50.47	0.271
GROUP 2	23	2.0000	0.755	0.155								
IMPOPT6 wheelchair access												
GROUP 1	28	2.7586	0.830	0.154	1.21	0.633	0.37	48	0.713	0.37	40.71	0.717
GROUP 2	21	2.6667	0.913	0.199								
IMPAMEN1 near recreation facilities												
GROUP 1	33	1.8091	0.878	0.118	1.74	0.148	-3.12	54	0.003	-2.97	38.84	0.005
GROUP 2	23	2.6522	0.695	0.157								

T - T E S T

GROUP 1 - GROUP EQ 1.00 Parkvale Buyers
GROUP 2 - GROUP EQ 2.00 Parkvale Non-buyers

VARIABLE	NUMBER OF CASES	MEAN	STANDARD DEVIATION	STANDARD ERROR	F VALUE	2-TAIL PROB	POOLED VARIANCE ESTIMATE T VALUE	POOLED VARIANCE ESTIMATE DEGREES OF FREEDOM	POOLED VARIANCE ESTIMATE 2-TAIL PROB	SEPARATE VARIANCE ESTIMATE T VALUE	SEPARATE VARIANCE ESTIMATE DEGREES OF FREEDOM	SEPARATE VARIANCE ESTIMATE 2-TAIL PROB
IMPAMEN2 near social activities												
GROUP 1	31	1.8032	0.700	0.126	1.92	0.095	-2.10	53	0.041	-2.01	40.29	0.051
GROUP 2	24	2.3750	0.970	0.198								

T - T E S T

GROUP 1 - SURVEY EQ 2 Edmonton Non-Buyers
GROUP 2 - SURVEY EQ 3 Red Deer Non-Buyers

VARIABLE	NUMBER OF CASES	MEAN	STANDARD DEVIATION	STANDARD ERROR	F VALUE	2-TAIL PROB	POOLED VARIANCE ESTIMATE T VALUE	POOLED VARIANCE ESTIMATE DEGREES OF FREEDOM	POOLED VARIANCE ESTIMATE 2-TAIL PROB	SEPARATE VARIANCE ESTIMATE T VALUE	SEPARATE VARIANCE ESTIMATE DEGREES OF FREEDOM	SEPARATE VARIANCE ESTIMATE 2-TAIL PROB
IMPLOT1 privacy												
GROUP 1	17	1.5882	0.507	0.123	1.03	0.925	-0.07	40	0.941	-0.07	34.18	0.941
GROUP 2	25	1.6000	0.500	0.100								
IMPLOT2 size												
GROUP 1	17	2.0000	0.866	0.210	1.96	0.144	1.11	38	0.273	1.05	27.52	0.293
GROUP 2	23	1.7391	0.619	0.129								
IMPLOT3 view												
GROUP 1	17	2.1176	0.781	0.189	1.88	0.175	2.15	38	0.038	2.09	28.02	0.047
GROUP 2	23	1.6522	0.573	0.119								
IMPLOT4 landscaping												
GROUP 1	17	1.7059	0.470	0.114	1.15	0.787	0.79	39	0.435	0.80	35.04	0.430
GROUP 2	24	1.5833	0.504	0.103								
IMPLOT5 direction facing												
GROUP 1	17	1.7647	0.903	0.219	1.95	0.145	0.45	38	0.656	0.44	27.55	0.665
GROUP 2	23	1.6522	0.647	0.135								
IMPEXT1 patio area												
GROUP 1	17	1.4706	0.514	0.125	1.88	0.188	-2.83	38	0.007	-2.87	35.00	0.005
GROUP 2	23	2.0435	0.706	0.147								
IMPEXT2 attached garage												
GROUP 1	17	1.2941	0.470	0.114	1.24	0.628	0.54	38	0.591	0.53	32.39	0.598
GROUP 2	23	1.2174	0.422	0.088								

T - T E S T

GROUP 1 - SURVEY EQ 2 Edmonton Non-Buyers
GROUP 2 - SURVEY EQ 3 Red Deer Non-Buyers.

VARIABLE	NUMBER OF CASES	MEAN	STANDARD DEVIATION	STANDARD ERROR	F VALUE	2-TAIL PROB.	POOLED VARIANCE ESTIMATE T VALUE	POOLED VARIANCE ESTIMATE DEGREES OF FREEDOM	POOLED VARIANCE ESTIMATE 2-TAIL PROB	SEPARATE VARIANCE ESTIMATE T VALUE	SEPARATE VARIANCE ESTIMATE DEGREES OF FREEDOM	SEPARATE VARIANCE ESTIMATE 2-TAIL PROB
IMPEXT3 parking												
GROUP 1	17	1.4118	0.618	0.150	1.10	0.821	-0.12	38	0.905	-0.12	33.63	0.906
GROUP 2	23	1.4348	0.590	0.123								
IMPEXT4 no steps												
GROUP 1	17	2.4118	0.795	0.193	1.18	0.718	2.89	40	0.006	2.88	32.71	0.008
GROUP 2	25	1.7200	0.737	0.147								
IMPEXT5 low maintenance												
GROUP 1	17	1.5294	0.514	0.125	1.02	0.941	0.44	39	0.663	0.44	34.38	0.664
GROUP 2	24	1.4583	0.509	0.104								
IMPEXT6 covered entrance												
GROUP 1	17	1.8412	0.827	0.201	1.58	0.323	1.24	37	0.208	1.25	30.01	0.223
GROUP 2	23	1.6364	0.658	0.140								
IMPEXT7 window type												
GROUP 1	17	1.8471	0.493	0.119	1.83	0.222	0.29	37	0.772	0.30	35.95	0.764
GROUP 2	23	1.8000	0.666	0.142								
IMPINT1 efficient floor plan												
GROUP 1	17	1.3529	0.493	0.119	1.24	0.833	0.70	39	0.488	0.69	33.19	0.497
GROUP 2	24	1.2500	0.442	0.090								
IMPINT2 good use of space												
GROUP 1	17	1.2941	0.470	0.114	1.05	0.883	0.14	37	0.887	0.14	34.03	0.887
GROUP 2	23	1.2727	0.455	0.097								

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13 DEC 87 PARKVALE STUDY
19:34:51 University of Alberta

C R O S S T A B U L A T I O N O F
LOCATION Development location BY PAID amount paid PAGE 1 OF 1

LOCATION	COUNT / ROW PCT / COL PCT / TOT PCT	PAID loss (1)	more (2)	same (3)	ROW TOTAL
Estates	4	14 63.6 82.4 40.0	2 9.1 33.3 5.7	6 27.3 50.0 17.1	22 62.9
Downs	5	3 23.1 17.6 8.6	4 30.8 66.7 11.4	6 46.2 50.0 17.1	13 37.1
	COLUMN TOTAL	17 48.6	6 17.1	12 34.3	35 100.0

CHI-SQUARE	D.F.	SIGNIFICANCE	MIN E.F.	CELLS WITH E.F. < 5
5.65733	2	0.0935	2.229	3 OF 6 (50.0%)

NUMBER OF MISSING OBSERVATIONS = 2

13 DEC 87 MERIZOS PARKVALE COMPARISON PAGE 104
19:35:54 University of Alberta

C R O S S T A B U L A T I O N O F
LOCATION Development location BY PAID amount paid PAGE 1 OF 1

LOCATION	COUNT / ROW PCT / COL PCT / TOT PCT	PAID loss (1)	more (2)	same (3)	ROW TOTAL
Morrison	1	11 21.6 39.3 12.8	32 62.7 84.2 37.2	8 15.7 40.0 9.3	51 59.3
Parkvale	2	17 48.6 60.7 19.8	6 17.1 15.8 7.0	12 34.3 60.0 14.0	35 40.7
	COLUMN TOTAL	28 32.6	38 44.2	20 23.3	86 100.0

CHI-SQUARE	D.F.	SIGNIFICANCE	MIN E.F.	CELLS WITH E.F. < 5
17.60432	2	0.0002	8.140	NONE

NUMBER OF MISSING OBSERVATIONS = 27

2 NOV 87 PARKVALE STUDY
22:38:10 University of Alberta

CROSSTABULATION OF LOCATION Development location BY INVOLVE involvement in development PAGE 1 OF 1

LOCATION	COUNT / ROW PCT / COL PCT / TOT PCT	INVOLVE: chose 1	had say 2	asked to no say / input 3	4	ROW TOTAL
Estates	4	7 33.3 38.8 20.0	8 38.1 72.0 17.1	6 28.6 100.0 17.1	2 9.5 100.0 5.7	21 60.0
Downs	5	12 85.7 63.2 34.3	2 14.3 25.0 5.7			14 40.0
COLUMN TOTAL		19 54.3	8 22.9	6 17.1	2 5.7	35 100.0

CHI-SQUARE	D.F.	SIGNIFICANCE	MIN E.F	CELLS WITH E.F < 5
10.32894	3	0.0160	0.800	6 OF 8 (75.0%)

NUMBER OF MISSING OBSERVATIONS = 2

2 NOV 87 PARKVALE STUDY
22:38:11 University of Alberta

CROSSTABULATION OF LOCATION Development location BY UNIT unit size PAGE 1 OF 1

LOCATION	COUNT / ROW PCT / COL PCT / TOT PCT	UNIT: smaller 1	larger 2	same size 3	ROW TOTAL
Estates	4	20 90.9 74.1 54.1	1 4.5 25.0 2.7	1 4.5 16.7 2.7	22 59.5
Downs	5	7 46.7 25.9 18.9	3 20.0 75.0 8.1	5 33.3 83.3 13.5	15 40.5
COLUMN TOTAL		27 73.0	4 10.8	6 16.2	37 100.0

CHI-SQUARE	D.F.	SIGNIFICANCE	MIN E.F	CELLS WITH E.F < 5
8.92091	2	0.0116	1.622	4 OF 6 (66.7%)

NUMBER OF MISSING OBSERVATIONS = 0

CROSSTABULATION OF LOCATION Development location BY AGEF age-female PAGE 1 OF 1

LOCATION	COUNT / ROW PCT / COL PCT / TOT PCT	AGEF 65yrs or less (1)	65 to 75 yrs (2)	over 75yrs (3)	ROW TOTAL
Estates	4	4 18.2 30.8 11.4	13 59.1 81.3 37.1	5 22.7 83.3 14.3	22 62.9
Downs	5	9 69.2 69.2 25.7	3 23.1 18.8 8.6	1 7.7 16.7 2.9	13 37.1
	COLUMN TOTAL	13 37.1	16 45.7	6 17.1	35 100.0

CHI-SQUARE	D.F.	SIGNIFICANCE	MIN E.F.	CELLS WITH E.F.< 5
9.12909	2	0.0104	2.229	3 OF 6 (50.0%)

NUMBER OF MISSING OBSERVATIONS = 2

CROSSTABULATION OF LOCATION Development location BY AGEM age-male PAGE 1 OF 1

LOCATION	COUNT / ROW PCT / COL PCT / TOT PCT	AGEM 65yrs or less (1)	65 to 75 yrs (2)	over 75yrs (3)	ROW TOTAL
Estates	8	1 4.5 16.7 2.8	8 40.9 75.0 25.0	12 54.5 66.7 33.3	22 61.1
Downs	5	5 35.7 83.3 13.9	3 21.4 25.0 8.3	6 42.9 33.3 16.7	14 38.9
	COLUMN TOTAL	6 16.7	12 33.3	18 50.0	36 100.0

CHI-SQUARE	D.F.	SIGNIFICANCE	MIN E.F.	CELLS WITH E.F.< 5
6.19480	2	0.0452	2.333	3 OF 6 (50.0%)

NUMBER OF MISSING OBSERVATIONS = 1

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CROSSTABULATION OF
LOCATION Development location BY EMPLOYF employment-female PAGE 1 OF 1

LOCATION	EMPLOYF full tim	part tim	retired	not empl oyed	ROW TOTAL
	1	2	4	5	
4 Estates			20 90.9 74.1 55.6	2 9.1 66.7 5.6	22 61.1
5 Downs	4 28.6 100.0 11.1	2 14.3 100.0 5.6	7 50.0 25.9 19.4	1 7.1 33.3 2.8	14 38.9
COLUMN TOTAL	4 11.1	2 5.6	27 75.0	3 8.3	36 100.0

CHI-SQUARE	D.F.	SIGNIFICANCE	MIN E.F.	CELLS WITH E.F.< 5
11.37652	3	0.0099	0.778	5 OF 8 (75.0%)

NUMBER OF MISSING OBSERVATIONS = 1

CROSSTABULATION OF
GROUP BY TRAVTIME time spent travelling PAGE 1 OF 1

GROUP	TRAVTIME <1month	1-2 mo	3-4 mo	5-6 mo	ROW TOTAL
	1	2	3	4	
1.00 Park Buyers	16 51.6 47.1 30.2	7 22.6 63.6 13.2	2 6.5 100.0 3.8	6 19.4 100.0 11.3	31 58.5
2.00 Park Non-Buyers	18 81.8 52.9 34.0	4 18.2 36.4 7.5			22 41.5
COLUMN TOTAL	34 64.2	11 20.8	2 3.8	6 11.3	53 100.0

CHI-SQUARE	D.F.	SIGNIFICANCE	MIN E.F.	CELLS WITH E.F.< 5
7.62747	3	0.0544	0.830	5 OF 8 (62.5%)

NUMBER OF MISSING OBSERVATIONS = 88

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C R O S S T A B U L A T I O N O F
LOCATION Development location BY TRAVTIME time spent travelling
PAGE 1 OF 1

LOCATION	TRAVTIME	<1month	1-2 mo	3-4 mo	5-6 mo	ROW TOTAL
		1	2	3	4	
Horizon	1	32	14	3		49
		65 3	28 6	6 1		61 3
		66 7	66 7	60 0		
		40 0	17 5	3 8		
Parkvale	2	16	7	2	6	31
		51 6	22 6	6 5	19 4	38 8
		33 3	33 3	40 0	100 0	
		20 0	8 8	2 5	7 5	
COLUMN TOTAL		48	21	5	6	80
		60 0	26 3	6 3	7 5	100 0

CHI-SQUARE	D F	SIGNIFICANCE	MIN E F	CELLS WITH E F < 5
10 34013	3	0 0159	1 938	4 OF 8 (50 0%)

NUMBER OF MISSING OBSERVATIONS = 33

C R O S S T A B U L A T I O N O F
SURVEY survey type BY TRAVTIME time spent travelling
PAGE 1 OF 1

SURVEY	TRAVTIME	< 1 mont h	1-2 mont hs	3-4 mont hs	ROW TOTAL
		1	2	3	
ED nonbuyer	2	6	10	1	17
		35 3	58 8	5 9	43 6
		25 0	71 4	100 0	
		15 4	25 6	2 6	
RD nonbuyer	3	18	4		22
		81 8	18 2		56 4
		75 0	28 6		
		46 2	10 3		
COLUMN TOTAL		24	14	1	39
		61 5	35 9	2 5	100 0

CHI-SQUARE	D F	SIGNIFICANCE	MIN E.F.	CELLS WITH E.F < 5
9 07884	2	0 0107	0 436	2 OF 6 (33 3%)

NUMBER OF MISSING OBSERVATIONS = 5

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. . . . . CROSSTABULATION OF . . . . . .
LOCATION Development location BY INCOME total household income
. . . . . PAGE 1 OF 1

	INCOME			
COUNT / ROW PCT / COL PCT / TOT PCT	<$20,000 1	$20-39,9 99 2	$40,000 or > 3	ROW TOTAL
LOCATION				
Estates	7 / 41.2 / 77.8 / 24.1	8 / 47.1 / 72.7 / 27.6	2 / 11.8 / 22.2 / 6.9	17 / 58.6
Downs	2 / 16.7 / 22.2 / 6.9	3 / 25.0 / 27.3 / 10.3	7 / 58.3 / 77.8 / 24.1	12 / 41.4
COLUMN TOTAL	9 / 31.0	11 / 37.9	9 / 31.0	29 / 100.0

CHI-SQUARE	D.F.	SIGNIFICANCE	MIN E.F.	CELLS WITH E.F.< 5
7.17864	2	0.0276	3.724	3 OF 6 (50.0%)

NUMBER OF MISSING OBSERVATIONS = 6

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PRECEDING TASK REQUIRED 0.11 SECONDS CPU TIME. 0.27 SECONDS ELAPSED.

```
731  0          FINISH

  731 COMMAND LINES READ
    0 ERRORS DETECTED
    0 WARNINGS ISSUED
    2 SECONDS CPU TIME
    6 SECONDS ELAPSED TIME
      END OF JOB
```

APPENDIX C

GLOSSARY

GLOSSARY

Buyer	an individual or couple who purchased a Parkvale Estates or Parkvale Downs unit.
Chi Square	a test of statistical significance which is used to determine if variables are independent or related.
Coding	technical procedure by which data are categorized into groups.
Condominium	exclusive ownership of one housing unit in a housing project and co-ownership of a fraction of the common space and facilities.
Cross-Tabulation	count of the number of cases that fall into each of several categories when the categories are based on two or more variables considered simultaneously; allow for statistical analysis using a test of significance such as chi square.
Data	pieces of information ready for analysis.
Depth Interview	a research technique designed to uncover consumer's underlying attitudes and/or motivations through lengthy and relatively unstructured interviews.
Empty Nester	older couple with no children left at home.
Fee Simple	a form of ownership in which a unit owner has individual title to both the unit and the land.
Frequencies	descriptive statistics used to organize data which is divided into variable categories. The number of cases in each category is the frequency.
Mean	the average number of observations or responses; the sum of all observations divided by the number of observations.
Missing Observations	when the number of responses is not equal to the number of respondents, it is most frequently due to missing data.
Multiple Response	a procedure performed by the computer using SPSS-X for analysis of questions which allowed for more than one response.
Non-buyer	an individual or couple who looked into purchasing a Parkvale Downs unit but decided against it.

Pretest	use of a questionnaire on a trial basis in a small pilot study to determine how well the questionnaire works.
S.D.	standard deviation; a statistic which indicates the extent to which the responses vary around the mean.
SPSS-X	Statistical Package for the Social Sciences is a computer program for data analysis.
Sample	part of the population selected for the study.
Significant Differences	determined through a statistical procedure to establish that the relationship did not occur due to chance.
T-Test	a statistical test to determine significant differences between the mean scores of two independent samples.
Variable	a characteristic which varies or is subject to change, such as income or satisfaction.